

PeopleSoft®

PeopleSoft EnterpriseOne Customer Relationship Management 8.11 SP1 Support Applications PeopleBook

August 2005

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About This PeopleBook Preface

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft applications.

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

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Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspres@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.

Typographical Convention or Visual Cue	Description
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

Address Book Number	Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.
As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are: <i>Blank:</i> Batch is unposted and pending approval. <i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted. <i>D:</i> The batch posted successfully. <i>E:</i> The batch is in error. You must correct the batch before it can post. <i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E. <i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	<p>Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.</p> <p>If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.</p> <p>If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.</p>
Document Number	Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.
Document Type	<p>Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:</p> <p><i>P</i>: Accounts payable documents.</p> <p><i>R</i>: Accounts receivable documents.</p> <p><i>T</i>: Time and pay documents.</p> <p><i>I</i>: Inventory documents.</p> <p><i>O</i>: Purchase order documents.</p> <p><i>S</i>: Sales order documents.</p>
Effective Date	<p>Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:</p> <ul style="list-style-type: none">• The date on which a change of address becomes effective.• The date on which a lease becomes effective.• The date on which a price becomes effective.• The date on which the currency exchange rate becomes effective.• The date on which a tax rate becomes effective.
Fiscal Period and Fiscal Year	Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).
G/L Date (general ledger date)	Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

PeopleSoft EnterpriseOne CRM Support Applications Preface

This preface discusses:

- PeopleSoft products
- PeopleSoft application fundamentals

PeopleSoft Products

This PeopleBook refers to these PeopleSoft products:

- PeopleSoft EnterpriseOne Advanced Pricing
- PeopleSoft EnterpriseOne Service Management
- PeopleSoft EnterpriseOne Foundation - Address Book
- PeopleSoft EnterpriseOne General Ledger

PeopleSoft Application Fundamentals

Additional essential information describing the setup and design of the system appears in a companion volume of documentation called *PeopleSoft EnterpriseOne Customer Relationship Management Application Fundamentals 8.11 SP1 PeopleBook*.

See Also

PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications 8.11 SP1 PeopleBook, “PeopleSoft EnterpriseOne CRM Application Fundamentals Preface”

CHAPTER 1

Getting Started with PeopleSoft EnterpriseOne Customer Relationship Management (CRM) Support Applications

This chapter discusses:

- CRM Support Applications overview
- CRM Support Applications integrations
- CRM Support Applications business processes
- (Rapid Start USA) CRM Support Applications business processes
- CRM Support Applications implementation

CRM Support Applications Overview

The PeopleSoft EnterpriseOne CRM Support Applications provide a company with a central point-of-contact to capture and manage service processes. PeopleSoft EnterpriseOne CRM Support Applications include these products:

- Case Management
- Solution Advisor
- Branch Scripting

Use the Case Management application to capture customer issues, track issues from creation to resolution, and set up rules to automatically assign cases to the appropriate people. The Case Management application enables companies to determine if and how they escalate cases. You can determine to escalate cases using the notification method and set up provider group distribution lists to send assignment and escalation notification to all provider group members when cases are assigned to the provider group. You can determine to escalate cases using skill levels and set up provider groups and assign skill levels to group members to systematically escalate cases to the next highest level provider group member during the escalation routine.

Through the Case Management application, you can assign tasks and activities to cases, associate objects such as service work orders, equipment work orders, sales orders, quotes, leads, scripts and returned material authorization (RMA) to cases, and review and assign solutions to cases.

If you are using Customer Self Service, you can set up the system to enable customers to enter and review their case information.

Solution Advisor is a knowledge base application that assembles and classifies customer-specific information. Use the Solution Advisor application to store and organize case and service work order resolutions. This information is accessible by customers (if you are using Customer Self Service) and support agents to assist them in finding resolutions for cases and service work orders.

See *PeopleSoft EnterpriseOne Customer Self Service 8.11 SPI PeopleBook*, “Using Service and Support Portal Applications”.

If you are not using Solution Advisor, you can set up and use the failure analysis module, a database that enables you to associate failures, analyses, and resolutions with cases and service work orders.

See *PeopleSoft EnterpriseOne Capital Asset Management 8.11 SPI PeopleBook*, “Working with Failure Analysis”.

Use the Branch Scripting application to define and set up question structures to assist you with gathering information to help you find case and service work order resolutions.

CRM Support Applications Integrations

The CRM Support Applications system integrates with these EnterpriseOne systems:

- General Accounting
- Accounts Receivable
- Address Book
- Advanced Pricing
- Sales Order Management
- Service Management
- Capital Asset Management
- Inventory Management

We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is located on the PeopleSoft Customer Connection website.

General Accounting

If you work in a multicurrency environment, you can access the General Accounting system to review and edit currency information as necessary.

Accounts Receivable

The Accounts Receivable system records the information used by Service Management to manage invoicing for case billing.

Address Book

All customers and service providers, including provider groups, technicians, provider group members, and call center agents, are set up in the Address Book. When activities are attached to cases, the assignee’s calendar control, located in the Address Book, is updated with the activity information.

Advanced Pricing

You can define advanced pricing adjustments and adjustment schedules and attach them to cases to determine case billing.

Sales Order Management

Through the Case Related Actions program (P90CG503), you can associate quotes, sales orders, leads, and RMA to cases.

Service Management

When you enter a case, the system calculates commitments according to the service contract, if one exists. To help you resolve a case, you can issue a service work order and associate it to the case. When searching for solutions, you can search for service work orders. The Service Management system manages invoicing for case billing.

Capital Asset Management

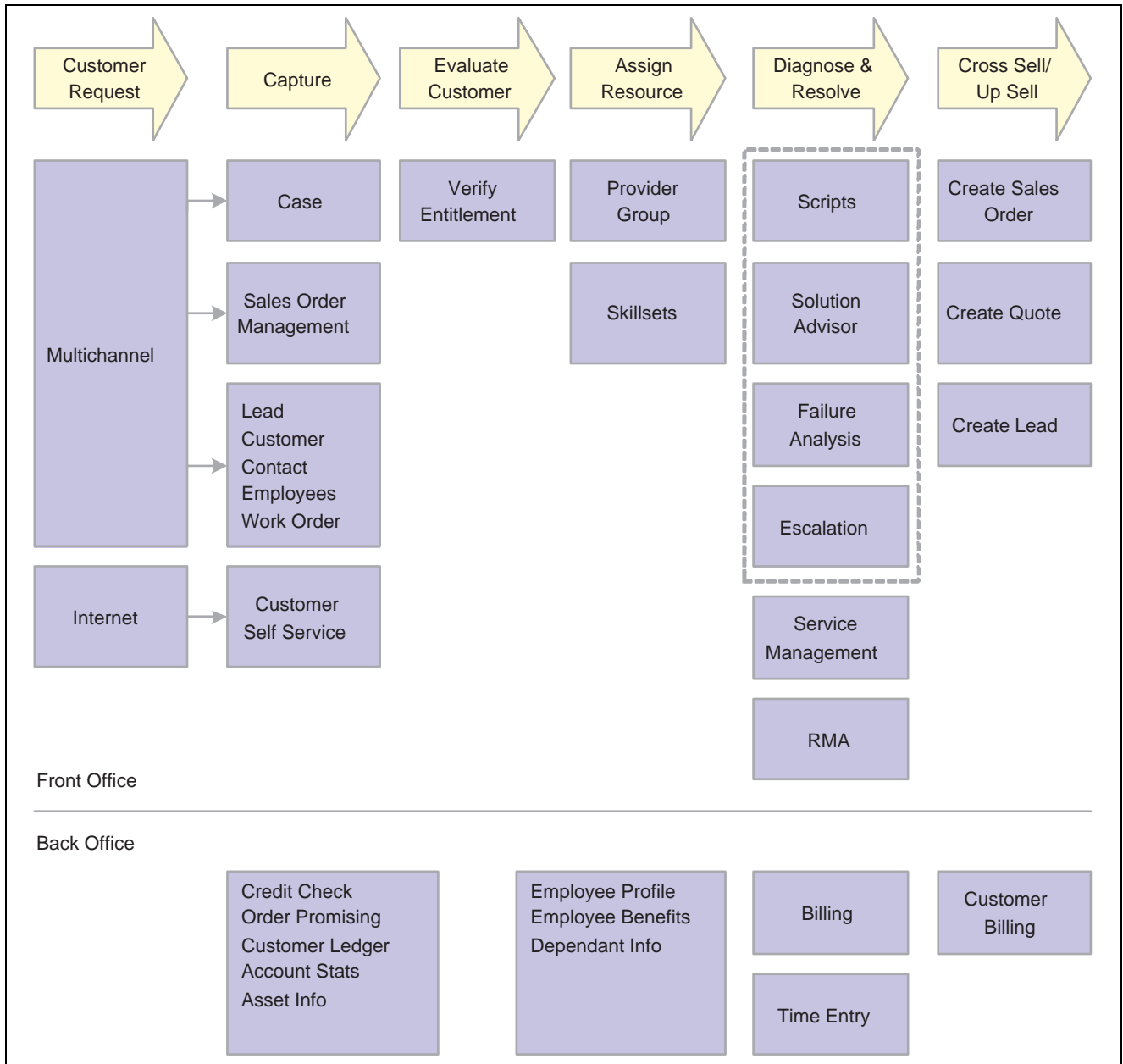
To help you resolve a case, you can issue an equipment work order and associate it to the case. When searching for solutions, you can search for equipment work orders

Inventory Management

If you are billing for cases, you set up distribution automatic accounting instructions (AAIs) to direct how case transactions are applied to accounts. You can associate solutions to items using the Frequently Used Solutions form in Solution Advisor.

CRM Support Applications Business Processes

This process flow illustrates the Request to Resolve business process, which is supported by CRM Support applications:



Request to resolve business process

We discuss this business process in the business process chapters in this PeopleBook.

(Rapid Start CAN and USA) CRM Support Applications Business Processes

Rapid Start for the United States includes all the functionality available in the PeopleSoft EnterpriseOne systems to perform business processes. For the CRM Support Applications system, Rapid Start preconfigured data is specifically set up for the enter basic case information business process.

See *PeopleSoft EnterpriseOne Rapid Start Fundamentals 8.11 SP1 PeopleBook*, “Getting Started with Rapid Start”.

This table lists the business processes, scenarios, and process steps for CRM Support Applications and refers you to the detailed information for each business process. The information in this table applies to Canada and the United States:

Business Process	Scenario	Process Steps	Reference
Capture issue.	Enter basic case information.	Enter a case. Review, revise, and manage cases.	See Chapter 8, “Entering Cases.” (Rapid Start CAN and USA) Entering Basic Case Information, page 115.

CRM Support Applications Implementation

This section provides an overview of the steps that are required to implement the CRM Support Applications system.

In the planning phase of the implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About These PeopleBooks* with all the information about where to find the most current version of each.

Global Implementation Steps

This table lists the suggested global implementation steps for PeopleSoft EnterpriseOne CRM products:

Step	Reference
1. Set up global UDC tables.	<i>PeopleSoft EnterpriseOne Tools 8.95: Foundation PeopleBook</i>
2. Set up companies, fiscal date patterns, and business units.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook, “Setting Up Organizations”</i>
3. (Optional) Set up accounts, and the chart of accounts.	<i>PeopleSoft EnterpriseOne Financial Management Solutions Application Fundamentals 8.11 SP1 PeopleBook, “Creating the Chart of Accounts”</i>
4. (Optional) Set up the General Accounting constants.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 SP1 PeopleBook, “Setting Up the General Accounting System”</i>
5. (Optional) Set up multicurrency processing, including currency codes and exchange rates.	<ul style="list-style-type: none"> <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 SP1 PeopleBook, “Setting Up General Accounting for Multicurrency Processing”</i> <i>PeopleSoft EnterpriseOne Multicurrency Processing 8.11 SP1 PeopleBook, “Setting Up Exchange Rates”</i>

Step	Reference
6. (Optional) Set up ledger type rules.	<i>PeopleSoft EnterpriseOne General Accounting 8.11 SPI PeopleBook</i> , “Setting Up the General Accounting System,” Forms Used to Set Up Ledger Type Rules
7. Set up branch/plant constants.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 SPI PeopleBook</i> , “Setting Up the Inventory Management System,” Setting Up Inventory Constants

Case Management-Specific Implementation Steps

This table lists the implementation steps for the Case Management system:

Step	Reference
1. Set up Case Management constants.	Chapter 3, “Setting Up Case Management Fundamentals,” page 15
2. Set up Case Management user defined codes (UDCs).	Chapter 3, “Setting Up Case Management Fundamentals,” page 15
3. Set up processing options for Case Management programs.	Chapter 3, “Setting Up Case Management Fundamentals,” page 15
4. Set up case activity rules.	Chapter 3, “Setting Up Case Management Fundamentals,” page 15
5. (Optional) Set up business object reservation.	Chapter 3, “Setting Up Case Management Fundamentals,” page 15
6. (Optional) Set up required fields.	Chapter 3, “Setting Up Case Management Fundamentals,” page 15
7. (Optional) Set up advanced pricing information for cases.	<ul style="list-style-type: none"> Chapter 3, “Setting Up Case Management Fundamentals,” page 15 <i>PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook</i>, “Setting Up Advanced Pricing for Service Management”
8. Set up provider group UDCs.	Chapter 4, “Setting Up Provider Groups,” page 41
9. Set up provider groups.	Chapter 4, “Setting Up Provider Groups,” page 41
10. Set up users as service providers.	<i>PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook</i> , “Setting Up Service Management”
11. Set up customers.	<i>PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook</i> , “Setting Up Service Management”
12. (Optional) Set up queue security and queue properties.	Chapter 4, “Setting Up Provider Groups,” page 41
13. (Optional) Set up routing information.	Chapter 4, “Setting Up Provider Groups,” page 41
14. Set up case types and case priorities.	Chapter 4, “Setting Up Provider Groups,” page 41
15. Set processing options for Work With Provider Groups program (P17506).	Chapter 4, “Setting Up Provider Groups,” page 41

Case Management Billing-Specific Implementation Steps

This table lists the required implementation steps for billing in the Case Management system:

Step	Reference
1. Set up distribution AAIs.	<i>PeopleSoft EnterpriseOne Inventory Management 8.11 SPI PeopleBook</i> , “Setting Up the Inventory Management System”
2. Set up accounts receivable AAIs.	<i>PeopleSoft EnterpriseOne Accounts Receivable 8.11 SPI PeopleBook</i> , “Setting Up the Accounts Receivable System”
3. Define the pricing method.	<u>Chapter 3, “Setting Up Case Management Fundamentals.” page 15</u>

Solution Advisor-Specific Implementation Steps

This table lists the required implementations step for the Solution Advisor system:

Step	Reference
1. Set up Solution Advisor UDCs.	<u>Chapter 7, “Setting Up Solution Advisor.” page 99</u>

CHAPTER 2

Understanding CRM Support Applications

This chapter discusses:

- Support applications
- Case processing
- Hotkeys for CRM support

Support Applications

This section discusses:

- Case management
- Provider groups
- Escalation methods
- Solutions
- Scripting

Case Management

Case management creates a central point of contact for all customer service processes. Case management enables you to capture the details of the customer's problem, track a case from creation to resolution, and create work orders to fulfill requests.

You can use the case management programs to:

- Record contact between customers and consultants.

Customers are concerned with the amount of time that it takes to call and report an issue. They do not want to be asked to supply information more than once or to provide information that the supplier or service provider should have available.

- Track a case with a single record.

You enter information once, and the system provides that information to all of the parties who need it. If you use Computer Telephony Integration or Multichannel Interaction Manager, all of the information that the system captures appears on the case entry form. When you identify a serial number, equipment number, or item number, the system uses the information from the equipment record and contract to complete the case entry form.

Use the Case-Manage form to enter and review all information related to a case. From this form, you have access to many other programs. This form provides tabs and access to the Case Entry (P90CG501), CRM Case Solutions (P90CG502), Case Activities (P90CG510), and CRM Case Related Actions (P90CG503) programs. You can also attach both internal and external messages or documents to the case by using media objects. You can secure the media objects through activity rules to protect the original media objects. To change media objects, users must use the Append option. If you are billing for cases, you enter customer billing information by using forms that you access from the Case-Manage form.

By using the Related Links link in the Case Entry program, you can select each piece of a case that you want to review. You can access multiple contact, customer, supplier, employee, item and equipment, and contracts programs through this link.

The Related Actions program, accessed through a tab in the Case Entry program, provides a list of objects that you can create and associate with the case, such as sales orders, quotes, work orders, equipment work orders, leads, scripts, and returned material authorization (RMA). You can then access the revision forms for these related actions through links on the form. These associations to the case are in the F90CG503 table that records the case or work order number, association type, lead ID, RMA number, and script ID. The F4801 table contains a secondary index for the case number for you to associate the case with the work order or equipment work order.

To help you manage cases, add activities such as messages or calendar items to a case through the Case Activities program, accessed through a tab on the Case Revisions form.

Provider Groups

Set up provider groups to ensure that cases are assigned to the appropriate people. For example, you might set up and organize provider groups according to product lines and group consultants who are knowledgeable about each product. You might also create provider groups to ensure that foreign language cases are directed to the appropriate groups.

Set up routing information to define the sequence and method by which cases are routed to the appropriate provider group.

Escalation Methods

The Service and Warranty Management (S/WM) Escalation method that you define in the S/WM System Constants program (P17001) determines how the system defines provider groups and escalates cases. You can decide to not perform escalations, escalate sending notifications, or escalate using skill levels.

If you determine to escalate cases using the notification method, Escalation Method 1 in S/WM System Constants, use the Distribution List Control program (P02150) to attach assignees to provider groups. Use the Queue Security program (P01135) to specify whether groups or specific users can make changes to the distribution lists. Use the Queue Properties program (P901133P) to define what programs distribution list members see when they open their Workflow queue.

The escalation percentages that you define on the Case Priority Revisions form determine how the system routes and escalates cases to distribution list members. When a case is assigned to a provider group, the system uses the values on this form to determine the escalation response time and sends notification to members on the distribution list that is assigned to the provider group.

If you determine to escalate cases using the skill level method, Escalation Method 2 in S/WM System Constants, you can assign members to provider groups using the Work With Provider Group Employees program (P90CG506). Through this program, you assign address book records (such as for employees or contractors) to provider groups and specify a skill level for each provider group member. You can assign any address book record to one or more provider groups, as long as the address book record has been set up as a service provider.

When cases are assigned to provider groups, the system compares the skill levels and case loads of each provider group member and assigns cases appropriately. The escalation percentages that you define on the Case Priority Revisions form determine when the system routes and escalates cases to provider group members.

Solutions

Solution Advisor, an additional software application that is used with cases, is a knowledge base application that assembles and classifies customer-specific information. Solution information is accessible by customers, as well as service and support agents, all of whom have the ability to search the knowledge base for an appropriate solution to a specific case or work order.

When you enter or review a case, you can access and assign solutions using the Solutions tab in the Case Revisions program. The Solutions application enables you to:

- Review the attempted solutions.
- Review the frequently used solutions.
- Search for solutions.
- Email solutions to the customer.
- Create a new solution that could be added to the Solution repository.

If you are not using Solution Advisor, you can set up and use the failure analysis module, a database that enables you to associate failures, analyses, and resolutions with cases and work orders.

See *PeopleSoft EnterpriseOne Capital Asset Management 8.11 SPI PeopleBook*, “Working with Failure Analysis”.

Scripting

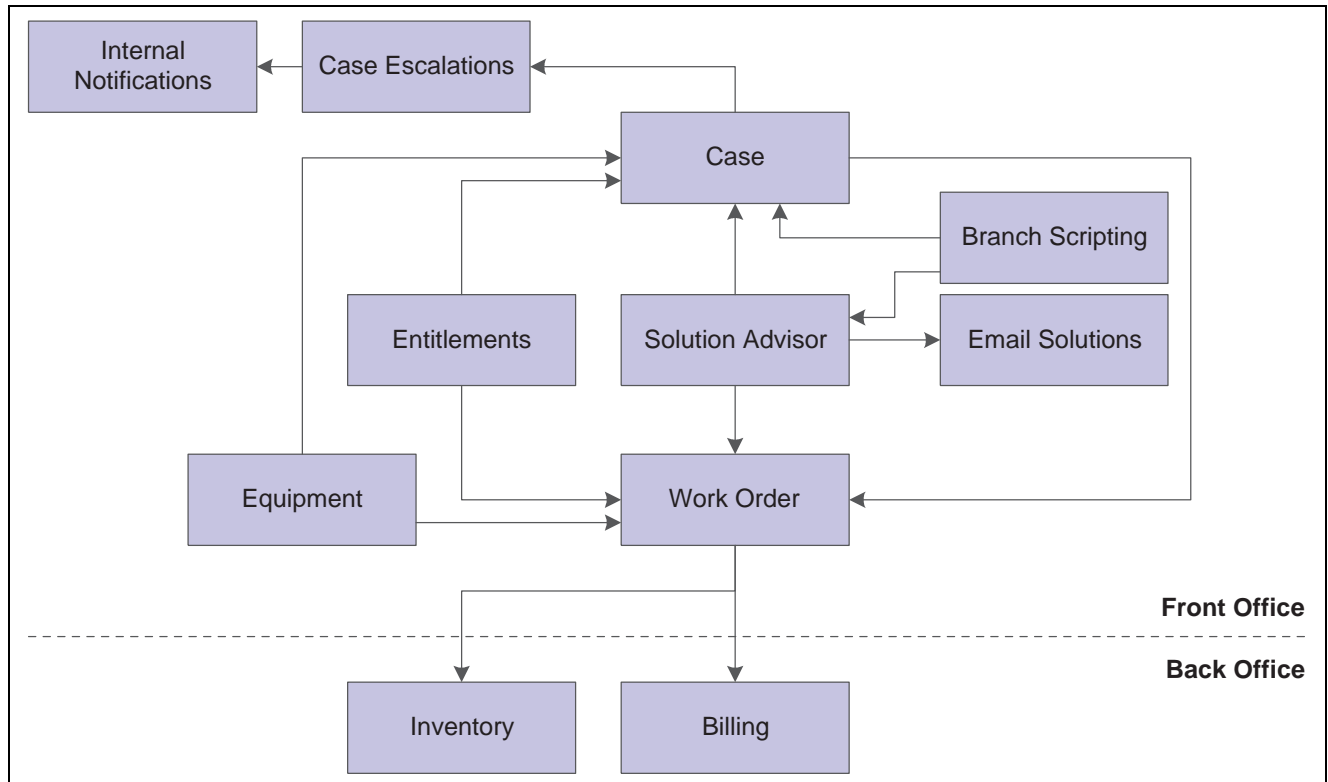
Use the Script program (P90CF160), a separate software application, to guide you to a case solution or to help you identify the cause of an issue. A script is a predefined set of questions or statements that are joined in a specific order and used to gather information from respondents. You can use branch scripts or linear scripts to help you find a solution to an active case.

Scripts can be either branch scripts, which use conditional logic to determine a sequence of questions, or linear scripts, which contain a fixed set of questions in a fixed order. If you use branch scripts, the system displays different questions based on the answers provided to you by the respondent. Linear scripts present the same response and next question each time that the script is run, regardless of the answer to the previous question.

Case Processing

Case management uses the support applications to enter and manage cases from case entry to resolution.

This diagram illustrates the support applications integration:



Support applications integration

Call center agents and customers can enter case information. Customers can enter case information if they are using customer self service. After the case is entered in the system, you can use Solution Advisor to search for and find possible case resolutions and email those solutions to the customers or other interested parties. You can also use branch scripting to further identify the problem source or guide you to possible case resolutions.

When you enter cases in the system, the escalation routine that you defined guides the case processing to provider group members and sends the associated notifications. The system also manages escalation processing if assignment, response time, or case priority changes.

If necessary, you can initiate a work order to resolve cases, and then process the associated billing transactions in the system. You can also set up the system to bill for cases and have the system process the appropriate transactions.

Hotkeys for CRM Support

You can navigate and interact with PeopleSoft EnterpriseOne applications using hotkeys for quicker, more efficient workflow. Hotkeys are designed to work in conjunction with the browser's existing hotkeys and enable you to work solely using the keyboard.

There are several hotkeys that you can use to navigate through all PeopleSoft EnterpriseOne applications. For example, you can press the TAB key on the keyboard to move the focus to the next field, button, or hotlink on any PeopleSoft EnterpriseOne form. In addition to those hotkeys, additional hotkeys are available that enable you to use buttons on CRM Support forms without using the mouse.

To use these hotkeys, you must hold down the SHIFT and the CTRL buttons on the keyboard while you press the hotkey. For example, N is the hotkey for the Add Answers button. To add answers to a script without clicking the Add Answers button, you press SHIFT + CTRL + N on the keyboard.

This table lists all of the CRM support hotkeys:

Button	Hotkey
Add Answers	N
Add Any Node	Y
Add Question	Q
Add Script	P
Assign Solution	N
Clear Default	L
Clone	L
Delete Node	D
Edit	D
Email Selected Solutions	M
Finish	N
Launch Case	L
Launch Email	M
Next	N
No	N
Preview Runtime	M
Previous	P
Search	Q
Set Default	U
Validate Script	L
Yes	Y

See Also

EnterpriseOne Tools 8.95 PeopleBook: Foundation

CHAPTER 3

Setting Up Case Management Fundamentals

This chapter provides an overview of Case Management setup requirements and discusses how to:

- Set up Case Management user defined codes (UDCs).
- Set up Case Management constants.
- Set up processing options for Case Management.
- Set up business object reservations.
- Set up required fields.
- Set up activity rules.
- Set up advanced pricing information for cases.

Understanding Case Management Setup Requirements

Before you can use any of the features of the Case Management programs, you need to define information that the system uses for controlling and processing cases. You also need to specify information that is used when you enter data into the system, such as when you enter a case, and the method used to escalate cases. The escalation method is defined through the system constants. When you enter cases, you can also assign tasks to cases.

Setting Up Case Management User Defined Codes (UDCs)

This section provides an overview of case management UDCs.

Understanding Case Management UDCs

Before you can use any of the features of the support applications, such as Case Management, you need to define information that the system uses for processing. You also need to specify the data that is used when you enter cases in the system.

You can access these UDCs from the Case User Defined Codes menu (G17431).

This table describes the information that you must set up for cases:

UDC	Type of Data
17/PR	Case Priority
17/CR	Case Reason
17/SC	Case Source
17/ST	Case Status
17/CT	Case Type
17/EN	Environment
17/GR	Geographic Region
H91/TZ	Time Zones
17/WT	Work Type
17/CB	Call Back
17/TN	Task Name
17/01 through 17/10	Case Category Codes 1 through 10
00/RR	<p>Object In Use Application ID.</p> <p>Use this UDC table to check when objects are in use in specific applications and to limit access to a record to only one user at a time.</p> <p>Set this UDC to check access in the Case Revisions program (P90CG501). To activate record locking, enter <i>1</i> as the first character in the Special Handling Code field. If you do not want to activate record locking, enter <i>0</i> as the first character in the Special Handling Code field.</p>
01/ST	<p>Address Book Search Type.</p> <p>Set up a search type in the Address Book to define provider groups.</p>

Setting Up Case Management Constants

To define default information for the entire system, you set up system constants. Constants control the types of information that you track and the rules that the system uses to perform calculations.

This section discusses how to set up Case Management constants. You must also set up the Customer Relationship Management (CRM) constants to activate the implicit save for case records.

See *PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications 8.11 SP1 PeopleBook*, “Setting Up CRM Constants and Employees”.

Form Used to Set Up Case Management Constants

Form Name	FormID	Navigation	Usage
S/WM System Constants Revisions	W17001C	Case Setup (G90CG), Service and Warranty Constants	Set up case constants.

Setting Up Case Management Constants

Access the S/WM System Constants Revisions form.

General

Select the General tab.

The screenshot shows the 'Service and Warranty Constants - S/WM System Constants Revisions' form. At the top, there are 'OK', 'Cancel', and 'Tools' buttons. Below that is a 'Select Tab:' dropdown menu set to '1-General'. The form is divided into three main sections:

- Defaults:** Contains three rows of fields:
 - 'Customer Number for Base Warranties' with a search icon.
 - 'Parent/Child Structure Type' with a dropdown menu and the label 'Accounts Receivable'.
 - 'Day Type Code for Holidays' with a dropdown menu showing 'H' and the label 'Holiday'.
- Constants:** A list of checkboxes:
 - S/WM Installed
 - Validate Product Family/Model Combination
 - Check for Previous Cases and Work Orders on Customers
 - Check for Previous Cases and Work Orders on Piece of Equipment
 - Use Failure Analysis Tree for Selecting Failure Analysis Codes
 - Use Workflow for Approving Failure Analysis for Re-Use
 - Use Graphical Parts Book
- Entitle By:** Radio buttons for 'Customer' (selected) and 'Site'.

S/WM System Constants Revision form: General tab

Check for Previous Cases and Work Orders on Customers

Select this option to check for any previous cases and work orders for the current customer number when you enter cases or work orders.

Check for Previous Cases and Work Orders on Piece of Equipment

Select this option to check for any previous cases and work orders for the current product (inventory number) when you enter cases or work orders.

Cases

Select the Case tab.

Service and Warranty Constants - S/WM System Constants Revisions

OK Cancel Tools

Select Tab: 2-Case

Defaults

Provider Group Search Type *	CMQ	Case Provider Group
Responsible BU Location	1	Inventory (F4117/F41171)
Type of Service *	W	Case
Mail Box for Escalation	67	Maint Req Escalation Mailbox
Case Entitlement Trigger	4	Equipment Number
Escalation	2	Escalation using skill level

Constants

- Message Center Interface
- Dynamic Word Rebuild
- Who's Who Required
- Log Status Change
- Use Base Price
- Use Solution Advisor

S/WM System Constants Revision form: Case tab

Provider Group Search Type

Enter the value from UDC 01/ST that specifies the Address Book search type for provider groups. When you add a provider group through the Provider Group Revisions program (P17506), the record is added to the F1797 table and the F0101 table with this search type.

Responsible BU Location (responsible business unit location)

Enter a code which determines which table the system uses to retrieve the responsible business unit for billing cases. Values are:

1: Inventory table (F4117/F41171).

2: Product Family/Model table (F1791).

3: Equipment table (F1201).

4: Customer Number table (F0101).

5: S&WM Line Type (Service and Warranty Management line type) table (F1793).

6: S&WM Customer Number (Service and Warranty Management customer number) table (F1797).

Type of Service

Enter a value from UDC 00/TY to indicate the classification type of request that is used for an entitlement check. The default value is *W* (case).

Mail Box for Escalation

Enter value from UDC 02/MB to define the location to hold messages for escalation.

Case Entitlement Trigger

Enter a value from UDC 17/ET to specify which field activates entitlement checking when you enter a case.

Escalation	<p>Select the escalation method. Values are:</p> <p>0: Do not use an escalation method.</p> <p>1: Escalate using notification.</p> <p>Escalations are processed using the work center notification and by email.</p> <p>2: Escalate using skill-levels.</p> <p>See Chapter 4, “Setting Up Provider Groups,” Setting Up Case Priorities Using Notification Escalation Method, page 54.</p> <p>and</p> <p>See Chapter 4, “Setting Up Provider Groups,” Setting Up Priorities Using Skill-Level Escalation Method, page 57.</p>
Message Center Interface	Select this check box to create a message for the case and the task records. You can view the message in the Work Center.
Dynamic Word Rebuild	Reserved for future use.
Who’s Who Required	Select this check box to specify whether the caller name for a case is required and must reside in the Address Book - Who’s Who records. If this check box is selected, you cannot add the case unless the caller name is selected from the visual assist and resides in the F0111 table.
Log Status Change	Select this check box to specify whether the system records call status changes to the text that is associated with a case. If you select this check box, the system generates a line of text that includes the original status, the new status, the user, and a date and time stamp.
Use Base Price	<p>Select this check box to specify whether the system uses base price for calculating case price. Select this field if you are using base pricing. If you are using advanced pricing, do not select this field; you need to set up additional fields for advanced pricing, which is discussed later in this chapter.</p> <p>See Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Advanced Pricing Information for Cases, page 39.</p>
Use Solution Advisor	<p>Select this field to specify whether to use the Solution Advisor application. If you do not select this field, the system will use failure analysis.</p> <p>See Chapter 7, “Setting Up Solution Advisor,” page 99.</p> <p>and</p> <p>See <i>PeopleSoft EnterpriseOne Capital Asset Management 8.11 SPI PeopleBook</i>, “Working with Failure Analysis”.</p>

Setting Up Processing Options for Case Management

Processing options enable you to specify the default processing for programs and reports.

This section discusses how to set processing options for:

- The Case MBF Processing Option program (P90CG002).

- The Case Entry program (P90CG504).
- The Case Update program (P90CG501).
- The Case CSS Inquiry and Add program (P90CG900).
- The CSS Case Update program (P90CG910).
- The Tasks program (P17504).
- The Work With Case program (P17500).
- The Time Entry program (P17505).
- CRM Case Related Actions (P90CG503).

When setting up the processing options for Case Entry and Case Update programs, you use the same Version list under Case Update. When setting up processing options for the Customer Self Service Case Entry program and the Customer Self Service Case Update program, you use the Version list under the CSS Inquiry and Add program.

Define the processing options for the Case Entry and Case Update programs to define and control how information is processed when you enter and revise cases.

If you are using Customer Self Service, you need to define the processing options for CSS Inquiry and Add and CSS Case Update programs.

Note. This section includes only those processing options that are required to be set up during implementation and are used to define system-wide processes. To access these processing options, enter *IV* in the fast path, and then enter the program ID in the Interactive Application field.

Setting Processing Options for the Case MBF Processing Options Program (P90CG002)

Use these processing options to define the basis for the Case Management system.

Default

Access the Default tab.

- | | |
|-------------------------|--|
| 1. Document Type | Use this processing option to specify the document type for the case. Enter a value from UDC 00/DT (Document Type). |
| 2. Problem | Use this processing option to specify whether the symptoms information is automatically filled in using the first line of the media object text. Values are:
Blank: Do not use the first line of the media object text.
<i>I</i> : Use the first line of the media object text as the symptom. |
| 3. Caller Name | Use this processing option to indicate whether the system uses the Customer Name as the Caller Name. Values are:
Blank: Do not use the customer's name as the caller name.
<i>I</i> : Use the customer name as the caller name. |
| 4. Assignee | Use this processing option to determine whether the system uses the user ID as the default assignee. Values are:
Blank: Do not use the user ID as the default for the assignee. |

- I*: Use the user ID as the default for the assignee.
- 5. Reporting Codes** Use this processing option to specify whether the system uses the reporting codes of the assignee from the S/WM Address Book Information table (F1797). Values are:
- Blank: Do not use reporting codes from the S/WM Address Book Information table.
- I*: Use reporting codes from the S/WM Address Book Information table.
- 6. Phone Number Type for the fax number** Use this processing option to define the phone number type for fax number. This is user defined code (01/PH) that indicates the use of the phone number.
- 7. Status for Case is assigned** Use this processing option to specify the default status when the system assigns the case. Enter a value from UDC 17/ST.
- 8. Provider Group** Use this processing option to indicate the default Provider Group number. The Provider Group number that you enter in this processing option overrides the Provider Group from routing rules.
- 9. Case Type** Use this processing option to specify the case type that the system uses as a default for the Work With Case program (P17500). Enter a value from UDC 17/CT. If you leave this processing option blank, the system uses the default value from the data dictionary.
- 10. Cost Type** If you are billing for calls and the pricing method is flat rate, use this processing option to specify the default cost type. Typically, enter *BI* (Direct Labor) as the default, or you can enter another value from UDC 30/CA (Cost Component Add-Ons).
- 11. Pricing Units** Use this processing option to specify the default pricing units on cases if you are billing for case and the pricing method is flat rate. Pricing units are quantities that the system uses to retrieve advanced pricing information, such as for price break levels based on quantities. Enter a number or use the default, which is 0 (zero).
- 12. Pricing Unit of Measure** Use this processing option to specify the default unit of measure used by the system to retrieve advanced pricing information. This option is used for billing for maintenance requests in which the pricing method is flat rate. Enter a value from UDC 00/UM (unit of measure). If you leave this processing option blank, the system uses *EA* (each).
- 13. Call Reason** Use this processing option to indicate the default Call Reason.
- 14. Responsible Business Unit** Use this processing option to indicate the default Responsible Business Unit.

Display

Access the Display tab.

- 1. Routing Information** Use this processing option to determine whether the system displays the routing information after pressing the OK button. Values are:
- Blank: Hide routing information.
- I*: Display routing information.

2. Equipment Information Use this processing option to determine whether the system displays the equipment information when the Customer Number is entered. Values are:

Blank: Do not display equipment information.

I: Display equipment information.

3. Who's Who Search/Select

Use this processing option to determine whether the Who's Who Search and Select appears when you move past the Customer Number field and the Caller Name field is blank. Values are:

Blank: Do not display the Who's Who Search and Select form.

I: Display the Who's Who Search and Select form.

Versions

Access the Versions tab.

Processing Options 1 through 34

Use these processing options to specify the default version of each program. These processing options do not apply to the Case application (P17501E). The default version of each program is listed here:

1. Work With Previous Customer Case (P17500) Version.
Default version = ZJDE0002.
2. Work With Previous Product Case (P17500) Version.
Default version = ZJDE0003.
3. Case History (P17500) Version.
Default version = ZJDE0004.
4. Work With Tasks (P17504) Version.
Default version = ZJDE0001.
5. Time Entry (P17505) Version.
Default version = ZJDE0001.
6. Quick Customer/Contact Add (P01015) Version.
Default version = ZJDE0001.
7. Address Book Revisions (P90CA080) Version.
Default version = ZJDE0001.
8. Customer Master (P90CA080) Version.
Default version = ZJDE0001.
9. Customer Ledger Inquiry (P03B2022) Version.
Default version = ZJDE0001.
10. Vendor Master (P04012) Version.
Default version = ZJDE0001.
11. A/P Standard Voucher Entry (P0411) Version.
Default version = ZJDE0001.
12. Payment Inquiry (P0413M) Version.

- Default version = ZJDE0001.
13. Eligibility (P08334) Version.
Default version = ZJDE0001.
 14. Employee DBA Instructions (P050181) Version.
Default version = ZJDE0001.
 15. Employee Profile (P060116) Version.
Default version = ZJDE0001.
 16. Work With Employee (P0801) Version.
Default version = ZJDE0001.
 17. Sales Order Entry (P42101) Version.
Default version = ZJDE0006.
 18. Supply and Demand Inquiry (P4021) Version.
Default version = ZJDE0001.
 19. Inquiry by Equipment (P48201) Version.
Default version = ZJDE0002.
 20. Work Order Revisions (P17714) Version.
Default version = ZJDE0001.
 21. Supplemental Data - Customer (P00092) Version
Default version = ZJDE0003.
 22. Supplemental Data - Item (P00092) Version.
Default version = ZJDE0001.
 23. Supplemental Data - Work Order (P00092) Version.
Default version = ZJDE0007.
 24. Supplemental Data - Sales Order (P00092) Version.
Default version = ZJDE0018.
 25. Equipment Master Inquiry (P1701) Version.
Default version = ZJDE0001.
 26. Equipment Master Revisions (P90CD0001) Version.
Default version = ZJDE0001.
 27. Contracts (P1720) Version.
Default version = ZJDE0001.
 28. Print Case (R17674) Version.
Default version = ZJDE0003.
 29. Case Workfile Generation (R17675) Version.
Default version = ZJDE0001.
 30. Service Billing Inquiry (P4812) Version.

Default version = ZJDE0001.

31. Failure Analysis Tree Search and Select (P17763S) Version.

Default version = ZJDE0001.

32. Work with Failure Analysis (P17766) Version.

Default version = ZJDE0001.

33. Failure Analysis (P17767) Version.

Default version = ZJDE0001.

34. Failure Analysis Search and Select (P17768) Version.

Default version = ZJDE0001.

Edits

Access the Edits tab.

1. Entitlement Check

Use this processing option to specify how the system performs the entitlement check. Values are:

Blank: Do not perform entitlement checking.

1: Check the entitlement with the date table (F1791).

2: Check the entitlement without the date table (F1791).

2. Maximum days for reopening Case

Use this processing option to specify the maximum number of days that you can reopen a closed case. If you leave this processing option blank, you cannot reopen a closed case.

3. Date/Time Opened

Use this processing option to specify whether the system uses the current date and time as the beginning date and time when you reopen a case. Values are:

Blank: The original date and time that the case was opened remain on the case.

1: The system uses the current date and time as the beginning date and time for the case.

4. Date/Time Returned

Use this processing option to specify whether to clear the date and time when a case is reopened. Values are:

Blank: Leave the original date and time in the case.

1: Clear the date and time in the case.

5. Area Code and Phone Number

Use this processing option to specify whether the system requires you to enter the area code and phone number when you enter a case. Values are:

Blank: Require the area code and phone number.

1: Do not require the area code and phone number.

6. Reason Code

Use this processing option to specify whether to require a reason code when you close a case. Values are:

Blank: Do not require a reason code.

1: Require a reason code.

Process

Access the Process tab.

1. Copy the text

Use this processing option to specify whether the system copies media object text when you copy a case. Values are:

Blank: Do not copy media object text.

1: Copy media object text.

2. Date/Time stamp

Use this processing option to determine where the Date/Time Stamp is printed in the comments area. You can choose to have the date/time stamp precede the comments (at the top) or after the comments (at the bottom). Values are:

Blank: Print the date/time stamp on top of comments.

1: Print the date/time stamp at the bottom of comments.

3. Protect the Provider Group

Use this processing option to indicate whether the queue number can be changed. Values are:

Blank: Allow changes to the queue number.

2: Do not allow changes to the queue number.

4. Protect Pricing Method

Use this processing option to specify whether the system prevents changes to the pricing method when you create a maintenance request. Values are:

Blank: Allow changes to the pricing method.

1: Prevent changes to the pricing method.

Note. If you allow changes to the pricing method, you can choose the flat rate pricing method, or the time and materials pricing method.

5. Customer inconsistent with Equipment Master

Use this processing option to specify whether the system verifies that the customer number on the case matches the customer number on the equipment master. If the customer numbers are different, you can specify whether the system updates the equipment master. Values are:

Blank: Do not compare the customer numbers.

1: Display a prompt to update the customer number on the equipment master to match the customer number on the case.

2: Automatically update the customer number on the equipment master to match the case customer number.

6. Site inconsistent with Equipment Master

Use this processing option to specify whether the system verifies that the site number for the case matches the equipment master site number. If the site numbers are different, you can specify whether the system updates the equipment master. Values are:

Blank: Do not compare the site numbers.

1: Display a prompt to update the site number to the equipment master to match the case site number.

2: Automatically update the site number to the equipment master to match the case site number.

- 7. Validate assignee in Provider Group** Use this processing option to determine when the assignee that is entered is set up in the queue. Values are:
- Blank: Do not check whether assignee is in queue.
 - 1*: Display error when assignee is in queue.
 - 2*: Display warning when assignee is in queue.
- 8. Check required fields** Use this processing option to specify whether the system verifies that there is information in the required fields. You define which fields are required in the Required Fields Setup (P1759) program or Status Rules Setup. Values are:
- Blank: Do not check the required fields.
 - 1*: Check the required fields.
- 9. Bill for Cases** Use this processing option to specify whether to bill for maintenance requests. You must activate this processing option if you need to enter billing information for maintenance requests. Values are:
- Blank: Do not bill for maintenance requests.
 - 1*: Bill for maintenance requests.
- 10. Next Number Processing** Use this processing option to specify whether the system captures next numbers that are temporarily assigned, but not used on permanent records. Values are:
- Blank: Do not capture burned next numbers.
 - 1*: Save burned next numbers as status 3.

Vertex

Access the Vertex tab.

- 1. Transaction Type for Flat Rate Billings** Use this processing option to specify the default transaction type for flat rate billing. If you leave this option blank, the system uses *SERVIC*.
- This processing option only pertains if Vertex's Quantum Sales and Use Tax Software (third-party tax software) has been implemented.

Setting Processing Options for the Case Entry Program (P90CG504)

Use these processing options to set up default processing for the Case Entry Program (P90CG504).

Versions

Access the Versions tab.

- 1. Case Master Business Function (P90CG002) for Case Add and 2. Case Update (P90CG501) Version.** Use these processing options to define the default version of the P90CG002 and P90CG501 programs. If you leave these options blank, the system uses version ZJDE0001.

Setting Processing Options for the Case Update Program (P90CG501)

Use these processing options to define default processing for the Case Update program (P90CG501).

Version

Access the Version tab.

- | | |
|---|---|
| 1. Case Master Business Function (P90CG002) Version. | Use this processing option to define the default version of the P90CG002 program. If you leave this option blank, the system uses version ZJDE0001. |
|---|---|

Setting Processing Options for the Case CSS Inquiry and Add Program (P90CG900)

Use these processing options to define default processing for the Case CSS Inquiry and Add program (P90CG900).

Versions

Access the Versions tab.

- | | |
|---|--|
| 1. CSS Case Add (P90CG904) Version and
2. CSS Case Update (P90CG910) Version | Use these processing options to define the default versions of the P90CG904 and P90CG910 programs. If you leave these options blank, the system uses version ZJDE0001. |
|---|--|

Setting Processing Options for the CSS Case Update Program(P90CG910)

Use these processing options to define default processing for the CSS Case Update program (P90CG910).

Version

Access the Version tab.

- | | |
|---|---|
| 1. Case Master Business Function (P90CG002) Version. | Use this processing option to define the default version of the P90CG002 program. If you leave this option blank, the system uses version ZJDE0001. |
|---|---|

Setting Up Processing Options for the Tasks Program (P17504)

You can configure the work space by setting processing options to include only the information with which you work directly. Some of the available options include case sequencing, sorting cases by priority or status, and preloading information to the work space to limit the information that appears. You can also lock tasks so that only one user at a time can review and change case information.

Defaults

The processing options on this tab define the defaults that the system uses when you run inquiries on tasks. Although you can override these values to search for tasks, you can specify defaults that are standard to most tasks on which you run inquiries in this version of Work With Tasks.

- | | |
|--|---|
| 1. From status and 2. To status | Specify the From status or the To status. The system displays only those tasks that are within the status specified in the From status and To status processing options. |
| 3. Document Type | Specify the document type for the system to use when you add a task directly through the Work With Tasks program. Document type CL (call) is the default. Enter document type if the case document type is different. |
| 4. Status to use when a task is assigned. | Define the case status code from UDC 17/ST to use when a task is assigned. |
| 5. Default the Assignee as the User | Specify the user as the default for the assignee. The system displays task that are assigned to the user. Values are:

Blank: Do not specify.
<i>1</i> : Specify. |
| 6. Default Document Type | Specify the document type for the system to use when you add a task directly through the Case Update program. The document type CL (call) is the default. Enter the document type if the case document type is different. |

Edits

The processing option on this tab defines what information the system verifies when you enter a task.

- | | |
|---|---|
| 1. Maximum Days for Reopening a Task | Specify the maximum number of days that a task can be closed and reopened. This processing option specifies the number of days that a closed task is eligible to be reopened. If you leave this processing option blank, the program does not check the number of days. Otherwise, enter a number to specify the number of days in which a user can reopen a task after it is closed. |
| 2. Entitlement | Use this processing option to specify how the system performs the entitlement check. Values are:

Blank: Do not perform entitlement checking.
<i>1</i> : Check the entitlement with the date table (F1791).
<i>2</i> : Check the entitlement without the date table (F1791). |

Process

The processing options on this tab define the processing that the system performs for this version of Work With Tasks.

- | | |
|--|---|
| 1. Check Required Fields | Specify whether the system verifies that there is information in the required fields. You define which fields are required in the Required Fields Setup program (P1759). Values are:

Blank: Do not check.
<i>1</i> : Check.

See Chapter 3, "Setting Up Case Management Fundamentals," Setting Up Required Fields, page 36. |
| 2. Notify when task is entered/closed | Specify whether the system sends notification when a task is entered or closed. Values are: |

Blank: Do not send.

I: Send notification to provider group when task is entered and to originator when task is closed.

3. Notify Assignee

Specify whether the system sends notification to the assignee. Values are:

Blank: Do not notify.

I: Notify.

4. Notify Queue

Specify if the system notifies the provider group. Values are:

Blank: Do not notify.

I: Notify.

5. Bill for Cases

Use this processing option to specify whether to bill for maintenance requests. You must activate this processing option if you need to enter billing information for maintenance requests. Values are: Blank Do not bill for maintenance requests. 1 Bill for maintenance requests.

Versions

These processing options control the version that the system uses when it calls these programs:

1. Time Entry (P17505) Version,, and 2. Work with Failure Analysis (P17766) Version

Use these processing options to specify the default version. If you leave these processing options blank, the system uses the ZJDE0001 default version.

Setting Up Processing Options for the Work With Case Program (P17500)

You can customize the work space by setting processing options to include only the information with which you work directly. Some of the available options include case sequencing, sorting cases by priority or status, and preloading information to the work space to limit the information that appears. You can also lock cases so that only one user at a time can review and change case information.

Display

The processing options on this tab indicate the information that the system displays when you run inquiries on cases using this version of Work With Case. For example, you can set up these processing options so that the system only displays those cases within a status range based on a time zone, call back time, country code, and language.

1. Time Zone Filter

Specify whether the system verifies the time zone of the customer. The system displays cases based on time zones. Values are:

Blank: Bypass time zone filter.

I: Check time zone filter.

If you select the option to check the time zone and then set the processing option to verify a call back time, the system verifies whether the time at the customer's location in the customer's time zone is within business hours. If the customer time is earlier or later than the business hours, the system does not display the calls.

- 2. Starting Call Back Time** Specify the call-back time to filter calls. If the time at the customer location is earlier than this time and time zone filter check box on the Work With Case form is selected, the system does not display the calls. When you enter a call-back time, you must enter military time and include the hour, minutes, and seconds. For example, 130000 for 13:00:00.
- If you set this processing option to verify a call back time and select the option to check the time zone filter, the system verifies whether the time at the customer's location is earlier than that current time. If the customer time is earlier than the current time, the system does not display the calls.
- 3. Country Code** Specify whether the system displays the Country Code field for you to use as selection criteria. Values are:
- Blank: Hide.
- I*: Display.
- If you display the country codes, you can indicate selection criteria that the system uses to display calls. To specify which country code the system uses as a default, set the Default Country Code processing option.
- 4. Language** Specify whether to display the Language field. Values are:
- Blank: Hide.
- I*: Display.
- If you select to display languages, you can indicate selection criteria that the system uses to display calls. To specify which language the system uses as a default language, set the Default Language processing option.
- 5. From status and 6. To status** Specify the From status or the To status. The system only displays those cases that are within the status specified in the From status and To status processing options.
- 7. Number of days to use for date filter** Specify a number of days with which the system uses to calculate the Date Entered From/Thru fields. The system displays only cases within this date range.
- If you leave this processing option blank, the system does not calculate filter dates.
- 8. Priority column** Specify whether the system displays priority with color. The color setup is defined in UDC 17/PR in the Special Handling column. Values are:
- Blank: Without color.
- I*: With color.
- 9. CTI Interface (computer telephony integration interface)** Specify whether the system displays the CTI interface. Values are:
- Blank: Hide.
- I*: Display.
- 10. In Use cases** Specify whether the system displays the cases that are currently in use by a user. Cases that are in use are locked in the system so that only one user at a time can access case information. Values are:
- Blank: Display locked cases.
- I*: Do not display locked cases.

Defaults

The processing options on this tab define the defaults that the system uses when you run inquiries on cases. Although you can override these values to search for cases, you can specify defaults that are standard to most cases on which you run inquiries in this version of Work With Case, such as country code, language code, assignee, and provider group.

- 1. Country Code** Specify the country code that the system uses when the Country Code field appears. The system displays cases that have this country code.

If you leave this processing option blank, the system does not use a specific country code in the selection criteria.

You must also set the Display Country Code processing option on the Display tab to display country codes.
- 2. Language** Specify which language to retrieve as the default language when the Language field is displayed. The system displays only cases that indicate this particular language preference.

If you leave this processing option blank, the system does not retrieve a default language.

You must also set the Display Language processing option on the Display tab to display languages.
- 3. Assignee** Specify the user as the default for the assignee. The system displays cases that are assigned to the user. Values are:

Blank: Do not specify.

I: Specify.
- 4. Provider Group** Specify the default provider group in the selection criteria. The system displays only cases that are assigned to this provider group. Values are:

0: Do not specify.

Specific queue: Specify.
- 5. Document Type** Use this processing option to specify the default document type.
- 6. Case Reason** Use this processing option to specify the default case reason.
- 7. Responsible Business Unit** Use this processing option to specify the default responsible business unit.

Versions

The processing options on this tab defines the versions that the system uses when it calls these programs:

- 1. Case Update (P90CG501) Version** Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0001 default version.
- 2. Case Add (P90CG504) Version** Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0001 default version.

- | | |
|--|--|
| 3. Supplemental Data (P00092) Version | Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0003 default version. |
| 4. Work With Tasks (P17504) Version | Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0001 default version. |
| 5. Work Center (P012501) Version | Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the ZJDE0005 default version. |
| 6. Print Case (R17674) Version | Use this processing option to specify the default version of the program. If you leave this processing option blank, the system uses the XJDE0003 default version. |
| 7. Work with Failure Analysis (P17766) Version and 8. Failure Analysis (P17767) Version | Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version. |

Process

The processing options on this tab define the processing that the system performs for this version of Work With Case.

- | | |
|----------------------------|--|
| 1. Deleting Records | Specify whether the system deletes records from the F17500 table. Values are:
Blank: Delete.
<i>I</i> : Do not delete, but change its status to 4. |
|----------------------------|--|

Setting Up Processing Options for Time Entry (P17505)

When you resolve a case, you need to enter time in order to accurately capture the amount of time spent on the issue for billing purposes. If you have contract and warranty agreements with customers that do not require billing by the hour, you still might need to report the time for accounting purposes. You can set the processing options to create either payroll batch transactions or general ledger transactions.

Setup options determine which stages of a case require time entry. You can set up the system to display the time entry form at any status change or only when the case is closed.

When you enter a case, the system calculates time entry information based on the time when you access the Case Entry form and the time when you exit the form. You can override the information, if necessary.

Process

The processing options on this tab define the processes that the system performs during time entry.

- | | |
|-------------------------------------|---|
| 1. Write time entry records | Specify the tables to which the system writes the time entry records. Values are:
Blank: Only F17860 table.
<i>I</i> : F0911Z1 and F17860 tables.
<i>2</i> : F06116Z1 and F17860 tables. |
| 2. Protected time entry line | Specify whether you can change the time entry line when you inquire on time entry information. Values are: |

- Blank: Do not protect.
I: Protect.
- 3. Round Actual Hours** Specify how to display the actual hours worked. Values are:
 Blank: Display actual hours.
I: Round to the quarter hour.
 2: Round to a tenth of an hour.
 3: Round to the half hour.
- 4. Round Billable Hours** Specify whether to round the billable hours. Values are:
 Blank: Do not round.
I: Round to the quarter hour.
 2: Round to a tenth of an hour.
 3: Round to the half hour.
- 5. Protect Minimum Hours and Amount** Specify whether to protect the information in the Minimum Hours and the Minimum Amount fields. Values are:
 Blank: Do not protect.
I: Protect.
- 6. Use Flex Accounting (FUTURE)** (Future Use) Specify whether to use flex accounting. Values are:
 Blank: Do not use.
I: Use.

Defaults

The processing options on this tab define the defaults that the system uses during time entry.

- 1. Hour Type** Specify the default hour type description code from UDC 17/WT. If you leave this processing option blank, the system does not retrieve the description.
- 2. Cost Type** Specify the default cost type if you bill for cases and the pricing method is time and materials.
 Typically, you enter *BI* (direct labor) as the default, or you can enter another value from UDC 30/CA (cost component add-ons).
- 3. Labor Unit of Measure** Specify the labor unit of measure for the Time Entry program.
 Enter a value from UDC 00/UM. If you leave this processing option blank, the default for the Labor Unit of Measure field is *HR* (hours).
- 4. Minimum Hours** Specify the minimum hours on each time entry record. If you leave this option blank, the default for the Minimum Hours field is *0*.
- 5. Subledger** Specify the information that the system records in the Subledger field when you create time entry records for the F06116Z1 or the F0911Z1 table. Values are:
 Blank: Leave the Subledger field blank.
I: Case number.

- 2: Customer number.
- 3: Site number.
- 4: Short item number.
- 5: Contract number.
- 6: Equipment number.

6. Labor Unit of Measure for Hour

Specify the unit of time that the system uses for the Hour field, such as *HR*. The system uses this processing option for Labor Unit of Measure conversion.

You must specify a value for this processing option if you want the system to upload the time entry record to the F06116Z1 table.

Enter a value from UDC 00/UM.

7. PDBA Code

Specify the default value for the PDBA code. The PDBA code defines the type of pay, deduction, benefit, or accrual. If you leave this processing option blank, the system leaves the PDBA code blank.

Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.

Versions

The processing options on this tab defines the versions that the system uses when it calls these programs:

1. Service Billing Inquiry (P4812), 2. Customer Ledger Inquiry, and 3. Time Entry MBF (P050002A)

If you leave these processing options blank, the system uses the ZJDE0001 default version.

Vertex

The processing option on this tab defines the Vertex transaction type for labor billing.

1. Transaction Type for Labor Billings

Specify the Vertex transaction type that the system uses when calculating taxes for time entry billing. Use this transaction type only if you bill for cases and the pricing method is Time and Materials.

Enter a value from UDC 83/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses the transaction type *SERVIC*.

Setting Up Processing Options for CRM Case Related Actions (P90CG503)

From the Case Revisions form or the Case Entry form, you can create and review a list of actions related to the case. Through the Related Actions tab, you can access other programs to associate sales orders, quotes, work orders, returned material authorization (RMA), scripts, action plans, and leads to cases.

Versions

The processing options on this tab defines the versions that the system uses when it calls these programs:

- 1. Sales Order (P42101) Version, 2. Quote (P42101) Version, and 3. Leads (P90CB010) Version** Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version.
- 4. Work Order (P90CD002) Version and 5. Return Material Authorization (P400511) Version** Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version.
- 6. Script (P90CF160) Version, 7. Script Runtime (P90CF180) Version, and 8. Equipment Work Order (P17714) Version** Use this processing option to specify the default version of the program. If you leave these processing options blank, the system uses the ZJDE0001 default version.

Setting Up Business Object Reservations

This sections provides an overview of business object reservations, lists a prerequisite, and discusses how to use business object reservations.

Understanding Business Object Reservations

Use the Business Object Reservation program (P00095) to view records, such as cases, that are locked. This program is shared by other programs as well, such as the Employee Master program and the Work Order Entry program, to review and unlock records. You can use this program to unlock records that have been locked because of system issues.

Prerequisite

You must define the program as a value in the Object in Use Application ID UDC (00/RR). For example, if you want to view cases that are locked, you must set up the Case Update program as a value in the Object in Use Application ID UDC.

Form Used to Set Up Business Object Reservations

Form Name	FormID	Navigation	Usage
Business Object Reservations	W00095A	Periodic Support Processing (G90CE02), Business Object Reservations	Search for records that are locked. If you want to unlock a record, select the record and click theDelete button.

Using Business Object Reservations

Access the Business Object Reservations form.

Object Name Enter the name that identifies a system object in the header area or on the Query By Example (QBE) line. Examples of system objects include:

Batch applications (such as reports)

Interactive applications

Business views

Business functions

Business function data structures

Event rules

Media object data structures

Application

Enter the batch or interactive program number in the QBE line.

Setting Up Required Fields

You can define the fields in which you are required to enter information before the system advances a case to the next status in the queue. Required fields can be based on specific request document types, request queues, and request types; or they can be set up to cover all document types, queues, and request types. For example, when a live request (call type 1) appears in the VIP queue and you advance it to the complete status (999), you can complete the reason field (CALLRN).

This section lists a prerequisite and discusses how to set up required fields for Case Management.

Prerequisite

Set the Check Required Fields processing option to enable the system to verify that information exists in the required fields.

See [Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Processing Options for the Work With Case Program \(P17500\), page 29.](#)

Form Used to Set Up Required Fields

Form Name	FormID	Navigation	Usage
Work With Case Required Fields	W1759B	Case Setup (G90CG), Required Fields On the Work With Case Required Fields form, enter the table number in the File Name field and click Find.	Define required fields.

Setting Up Required Fields for Case Management

Access the Work With Case Required Fields form.

Required Fields - Work With Case Required Fields

Select Find Add Delete Close Row Tools

File Name F1755 Case Master

Document Type *

Provider Group *

Case Type *

Case Status *

Records 1 - 2

File Name	File Name Description	Document Type	Case Provider	Case Provider Group	Case Type	Case Type	Case Status
<input checked="" type="radio"/> F1755	Case Master	CL	60000	Main Phone Queue	1	Live	999
<input type="radio"/> F1755	Case Master	CL	60001	Computerized Branch E	3	E-Mail	100

Work With Case Required Fields form

Complete the form to set up required fields for cases.

File Name Enter the table name. Enter *F1755* to specify Case Master table, and *F1757* to specify Task Master table.

Data Item Enter the alias. You cannot change the alias.

If you set up required fields for cases, you select data item fields from the F1755 table.

If you set up required fields for tasks, you select data item fields from the F1757 table.

Setting Up Activity Rules

Set up activity rules to define how the system processes cases.

This section provides an overview of case activity rules and discusses how to set up activity rules.

Understanding Case Activity Rules

You can set up activity rules for cases to define the status flow for cases and to define the next step, based on the current status. To have the system proceed to the next step, you must enter the next status in the Last Status field. If you do not include the next status, the case is considered complete. If you enter an open status code in one of the other columns, you can reopen the case.

Form Used to Set Up Activity Rules

Form Name	FormID	Navigation	Usage
Case Provider Group Status Revisions	W17506D	Case Setup (G90CG), Provider Group Revisions Select Provdr Group Status (provider group status) from the Form menu on the Work With Provider Groups form.	Define activity rules for cases.

Case Activity Rules Example

This table is an example of how you might set up case statuses. The Last Status column shows the status of the case and the Status Description column provides a description of the status. The remaining columns in the table show the next statuses that are allowable for the case at the last status. For example, you can change an open case (100) to an active case (150). Then you might leave a message (250), or you might cancel the case (997). A case that has the last status of Complete (999) can be reopened (100).

Last Status	Status Description	Next Status	Other	Other
100	Open	150	250	997
150	Active	999		
250	Left Message	999		
997	Cancel			
999	Complete		100	

Setting Up Activity Rules

Access the Case Provider Group Status Revisions form.

Provider Group Revisions - Case Provider Group Status Revisions i ?

OK Find Delete Cancel Row Tools

Document Type

Provider Group Number

Case

Records 1 - 7 Customize Grid

	Last Status	Description	Next Status	Other 1	Other 2	Other 3	Other 4	Other 5	Protect History	Auto Update	Time Entry	Failure Analysis	Subledger Inactive
<input checked="" type="radio"/>			100	110	260	997	999		N	N	N	N	N
<input type="radio"/>	100	Open	110	260	997				N	N	N	N	N
<input type="radio"/>	110	Active	260	997	999				N	N	N	N	N
<input type="radio"/>	260	Transferred	999						N	N	N	N	N
<input type="radio"/>	997	Cancel							N	N	N	N	N
<input type="radio"/>	999	Complete		100					Y	N	N	N	N
<input type="radio"/>													

Case Provider Group Status Revisions form

Last Status	Enter a code that specifies the status of a case.
Next Status	Enter an active customer issue status. This is used as default status when a user activates a customer issue. If you consider the last status that you enter to be a closed case, leave this field blank. If the Next Status field is blank, the system treats the case as closed. If you want to be able to reopen a closed case, enter the Open status in one of the Other status fields.
Protect History	Enter a code that specifies whether you can change a case that has a particular status.
Auto Update	Enter a code that specifies whether the system can update a case that has a particular status.
Time Entry	Enter a code that specifies whether the system displays a time entry form for a particular status.
Failure Analysis	Enter a code that specifies whether the system displays a failure analysis form for a particular status.

Setting Up Advanced Pricing Information for Cases

This section provides an overview of Advanced Pricing for Case Management and lists a prerequisite.

Understanding Advanced Pricing for Case Management

You can attach an advanced pricing adjustment schedule to a case. Setting up advanced pricing for cases enables you to price items and services by using an advanced pricing structure, and it enables you to streamline pricing setup and maintenance.

A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions.

When you enter a case, the system copies the schedule attached to the sold-to address into the order. You can override this schedule at the header level.

To set up advanced pricing for cases, you follow the same steps that you use to set up advanced pricing for Service Management.

Prerequisite

Before you can attach an adjustment schedule to a case, you must complete these tasks:

- Set up preference hierarchies.
- Set up customer service detail groups.
- Set up price adjustment definitions.
- Set up adjustment schedules.
- Set up adjustment details.

See Chapter 5, “Understanding Case Management Billing,” page 61.

and

See *PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications 8.11 SP1 PeopleBook*, “Setting Up CRM Constants and Employees”.

CHAPTER 4

Setting Up Provider Groups

This chapter provides an overview of provider groups and escalation methods and discusses how to:

- Set up provider group user defined codes (UDCs).
- Set up provider groups.
- Set up queue security.
- Set up queue properties.
- Set up routing information.
- Set up case types.
- Set up case priorities using notification escalation method.
- Set up priorities using skill-level escalation method.
- Set up processing options for the Work With Provider Groups program (P17506).

Understanding Provider Groups and Escalation Methods

Set up provider groups to ensure that cases are assigned to the appropriate people. For example, you might set up and organize provider groups according to product lines and group consultants who are knowledgeable about each product into specific provider groups. You might also create provider groups to ensure that foreign language cases are directed to the appropriate groups.

Set up routing information to define the sequence and method by which cases are routed to the appropriate provider group.

The service and warranty management (S/WM) escalation method that you define in the S/WM System Constants program (P17001) determines how the system defines provider groups and escalates cases.

Note. Setup requirements that are specific to an escalation method are noted in the applicable setup procedure.

Notification Escalation Method

If you decide to escalate cases using the notification method (escalation method 1 in the S/WM System Constants program), use the Distribution List Control program (P02150) to attach assignees to provider groups. Use the Queue Security program (P01135) to specify whether groups or specific users can make changes to the distribution lists.

Through the Queue Properties program (P901133P), define which programs distribution list members view when they open their Workflow queue.

The escalation percentages you define on the Case Priority Revisions form determine how the system routes and escalates cases to distribution list members. When a case is assigned to a provider group, the system uses the values in this form to determine the escalation response time and sends notification to members on the distribution list assigned to the provider group.

Skill-Level Escalation Method

If you decide to escalate cases using the skill-level method (escalation method 2 in the S/WM System Constants program), you can assign members to provider groups using the Work With Provider Group Employees program (P90CG506). Through this program, you assign address book records, such as employees or contractors, to provider groups and specify a skill-level for each provider group member. You can assign any address book record to one or more provider groups, as long as the address book record has been set up as a service provider.

When cases are assigned to provider groups, the system compares the skill-levels and case loads of each provider group member and assigns cases appropriately.

The escalation percentages that you define on the Case Priority Revisions form determine when the system routes and escalates cases to provider group members.

Setting Up Provider Group User Defined Codes (UDCs)

This section provides an overview of provider group UDCs.

Understanding Provider Group UDCs

Before you can use any of the features of Provider Groups, you need to define information that the system uses for processing. You also need to specify the data that is used when you set up provider groups in the system.

You can access these UDCs from the Case User Defined Codes menu (G90CG01).

This table describes the information that you must set up for provider groups:

UDC	Type of Data
90CG/SL	<p>Skill Level</p> <p>Define the skill levels that the system uses for escalation when the Escalate using Skill Levels option is selected. The system starts with the provider group member with the lowest skill level and proceeds to the next highest level within the provider group when processing escalations. You can enter additional skill levels, as needed; however, you must enter integers. For example, enter 5, 6, 7, and so on, as skill levels.</p>
17/PR	<p>Case Priority</p> <p>Use case priorities to define and organize cases by severity level.</p>

Setting Up Provider Groups

This section provides an overview of provider groups, lists a prerequisite, and discusses how to:

- Set up a provider group.
- Assign provider group members using skill levels.
- Assign provider group members using distribution lists.

Understanding Provider Groups

Provider groups are a particular search type (UDC 01/ST) in the Address Book. Use the Work With Provider Groups program to set up provider groups. When you set up a provider group, the system adds a record to the F1797 and F0101 tables.

If you escalate cases using skill levels, use the Provider Group Employees program to identify the members of each provider group and the skill level associated with each member.

If you escalate cases using distribution lists, use the Distribution List Control program to attach assignees to provider groups. When you define organizational structures, you create hierarchies of relationships between parents and children.

Prerequisite

All provider group members must first be set up in the Address Book and defined as service providers.

See *PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook*, “Setting Up Service Management,” Setting Up Customers and Service Providers.

See *PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook*, “Setting Up Service Management,” Setting Up Customers and Service Providers.

Forms Used to Set Up Provider Groups

Form Name	FormID	Navigation	Usage
Provider Group Revisions	W17506B	Case Setup (G90CG), Provider Group Revisions Click the Add button on the Work With Provider Groups form.	Set up provider groups. You might need to add provider groups if the organization expands its product groups or if you decide to assign specialists to cases based on knowledge of product groups.

Page Name	Object Name	Navigation	Usage
Provider Group Employees	W90CG506B	On the Work With Provider Groups form, search and select a provider group, and click Provider Grp Empl (provider group employee) from the Row menu.	<p>Define members and associate skill levels with the provider group.</p> <p>Note. Use this form if you are escalating cases using skill levels. If you have not set the escalation constant in the S/WM System Constants program to escalate using skill level, the Provider Grp Empl option will not be available from the Row menu.</p> <p>Any address book record Search Type, not just employees, can be assigned to a provider group. The only requirement is that they must be set up as service providers in the Address Book.</p> <p>See <i>PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook</i>, “Setting Up Service Management,” Setting Up Customers and Service Providers.</p>
Work With Distribution Lists	W02150A	<p>On the Work With Provider Groups form, search and select a provider group, and click Workflow Grp Rev(workflow group revisions) from the Row menu.</p> <p>Alternatively, select Case Setup (G90CG), Group Revisions.</p>	<p>Review distribution list information.</p> <p>Note. Use this form if you are escalating cases using the notification method.</p>
Address Parent/Child Revisions	W0150A	On the Work With Distribution Lists form, click Add.	<p>Set up distribution lists for provider groups.</p> <p>Note. Use this form if you are escalating cases using the notification method.</p>

Setting Up a Provider Group

Access the Provider Group Revisions form.

Provider Group Revisions form

Provider Group Information

Access the Provider Group Information tab.

Provider Group Number/Name

Enter an existing Address Book number.

You can either manually enter a provider group number, or you can leave the field blank and have the system assign a provider group number. The system creates an Address Book record for this new provider group with that provider group number.

Name

Enter the provider group name. This 40-character alphabetic field appears on many forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on these special characters when you use this field to search for a name.

Long Provider Group Number

Enter a value in this field to enter and locate information. If you enter a value other than the Address Book number such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.

For example, if Address Book number 4100 (total solutions) has a long address TOTAL and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type *TOTAL into the field, and the system would return 4100.

Mail Box Designator

Enter a mailbox code from UDC 02/MB associated with the provider group that should be used on delivery of the message.

ACD Extension (automatic call distributor extension)

Enter the telephone number of the provider group. Do not enter a prefix or special characters, such as hyphens or periods. You can use any applicable

telephone number format for a country. This field is used in conjunction with the Prefix field; you enter the first segment of the telephone number, which is called the area code in the U.S. When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system, including any special characters.

Work Center

Complete this field to calculate commitment date and time if you are not using entitlements. The system also uses the work center to calculate the elapsed time and the time remaining on the request.

Case Category Code 05 and Case Category Code 06

Enter the case category codes (UDCs 17/05 and 17/06) to record additional information for a provider group. You can use this information for reporting on provider groups.

Pager/E-mail Address

Enter the provider group’s page or email information. This field is a text field.

Associated Addresses

Access the Associated Addresses tab.

1st Address Number, 2nd Address Number, 3rd Address Number, 4th Address Number, 5th Address Number, and 6th Address Number

Completes the address number information for a case assigned to a provider group.
Do not associate the Address Book number of consultants who receive cases for this provider group. Instead, associate consultants with the provider groups that are appropriate for reporting purposes or for workflow. To associate consultants to a provider group, include them as a member of the provider group.

Assigning Provider Group Members Using Skill Levels

Access the Provider Group Employees form.

Provider Group Revisions - Provider Group Employees

OK Delete Cancel Tools

Provider Group: 60001 Computerized Branch Exch. Queu

Records 1 - 4 Customize Grid

	Employee * Number	Name	Skill Level	Skill Description	Manager	Unavailable Flag
<input checked="" type="radio"/>	2006	Walters, Annette	01	Skill level 1	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>	6001	Allen, Ray	03	Skill level 3	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>	6002	Dominique Abbott	02	Skill level 2	<input type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/>					<input type="checkbox"/>	<input type="checkbox"/>

Set Manager Clear Manager

Provider Group Employees form

- Employee Number** Enter the Address Book number of the person whom you assign to the provider group. You can assign Address Book numbers with all search types to a provider group as long as the Address Book record has been set up as a service provider.

- Skill Level** Enter the provider group member's skill level. Use a value from UDC 90CG/SL. The system uses each provider group member's skill level to assign cases and process escalations. When assigning cases, the system starts with the provider group member with the lowest skill level and then proceeds to the next skill level.

- Manager** Define the manager for the provider group. You can select only one manager per provider group. To select the provider group's manager, you must click the radio button by the member and then select Set Manager. The manager of each provider group receives the past due notification and is assigned to all unresolved cases. The manager still receives past due case assignments even if the Unavailable Flag is selected.

- Unavailable Flag** Select this field for members who are unavailable for case assignment; for example, when they are on vacation or out of the office. Provider group members that have the Unavailable Flag selected do not have any cases assigned to them until the field is cleared.

Assigning Provider Group Members Using Distribution Lists

Access the Address Parent/Child Revisions form.

Group Revisions - Address Parent/Child Revisions

OK Delete Cancel Form Tools

Parent Number * 60001 *Computerized Branch Exch. Queu* First Response
 Structure Type *Accounts Receivable* Higher Level Override
 Associated Data Item Authorization Required

Records 1 - 3

<input type="checkbox"/>	<input type="checkbox"/>	Group	Address Number	Alpha Name	Threshold Value	Escalation Hours	Escalation Minutes	Remark
<input type="checkbox"/>		1.00	5055	Kellerman, James				
<input type="checkbox"/>		2.00	6001	Allen, Ray				
<input type="checkbox"/>		3.00	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Address Parent/Child Revisions form

- Parent Number** Enter the parent number for the distribution list. The system uses this number to associate addresses with the parent distribution list. Any value that you enter in this field updates the F0150 table for the blank structure type. This address number must exist in the F0101 table for validation purposes.

The Address Book number of the primary level in a hierarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.

Structure Type	<p>Enter a value from UDC 01/TS that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email).</p> <p>When you create a parent-child relationship for the Accounts Receivable system, the structure type must be blank.</p> <p>The field identifies the type of distribution list, such as <i>WFS</i> for workflow, <i>ORG</i> for group, and <i>EML</i> for email. Enter <i>WFS</i> as the value.</p>
Group	<p>Enter the group number. When you define case priorities, the Message Level field in the Case Priorities program uses the value in this field to determine who receives messages when cases are escalated.</p> <p>See Chapter 4, “Setting Up Provider Groups,” Setting Up Case Priorities Using Notification Escalation Method, page 54.</p>
Address Number	Enter a number that identifies an entry in the Address Book, such as employee, applicant, participant, customer, supplier, tenant, or location.
Remark	Enter a remark, description, name, or address. This field is a generic field.
Begin Eff Date (beginning effective date)	<p>Enter the date on which the address number appears in the structure. The Beginning Effective Date field prevents the address number from occurring in the structure until the beginning effective date is the same as the current date.</p> <p>If left blank, the address number always occurs in a structure unless there is an ending effective date.</p>
End Eff Date (ending effective date)	Enter the date on which the Address Book record ceases to exist in the structure.

Note. Threshold values, escalation hours, and escalation minutes are not used for cases.

Setting Up Queue Security

This section provides an overview of queue security and discusses how to set up queue security.

Understanding Queue Security

If you are escalating cases using the notification method, you can set up the security status for a user or group of users within a workflow message queue. You can add security by user, distribution list, or both.

Form Used to Set Up Queue Security

Form Name	FormID	Navigation	Usage
Workflow Message Security Revisions	W01135A	<p>Case Setup (G1743), Queue Security</p> <p>Click the Add button on the Work With Workflow Message Security form.</p>	<p>Set up queue security.</p> <p>Note. For security reasons, this form is available only in the Windows client.</p>

Setting Up Queue Security

Access the Workflow Message Security Revisions form.

User	Enter a user in the workflow system. This field can also specify a group.
Group/Role	Enter a group or list of users in the workflow system; the Address Book number that identifies a list of users in the workflow system.
Authority Y/N	Enter whether the user is authorized to make changes to security information. For workflow, this field indicates whether the user can view other queues in the Work Center.

Setting Up Queue Properties

This section provides an overview of queue properties and discusses how to set up queue properties.

Understanding Queue Properties

If you escalate cases using the notification method, you can set up queue properties to provide a link to an EnterpriseOne application if, for example, you want recipients to review information within an EnterpriseOne application whenever they open messages in that particular queue.

Forms Used to Set Up Queue Properties

Form Name	FormID	Navigation	Usage
Work With Queues	W01133PA	Case Setup (G1743), Queue Properties	Review the list of queues.
Queues Properties Revisions	W01133PB	Click the Add button on the Work With Queues form.	Set up queue properties. Note. For security reasons, this form is only available in Windows Client.

Setting Up Queue Properties

Access the Queues Property Revisions form

Queues	Enter a field that determines the mailbox associated with the queue that is used on delivery of the message.
Application	Enter the name that identifies a system object. PeopleSoft EnterpriseOne architecture is object-based. Discrete software objects are the building blocks for all applications, and developers can reuse the objects in multiple applications. The object librarian tracks each object. Examples of system objects include: Batch applications (such as reports). Interactive applications. Business views. Business functions. Business function data structures.

	Event rules.
	Media object data structures.
Form Name	Enter a unique name that identifies a form.
Version	Enter a specific set of data selection and sequencing settings for the application. Versions can be names using any combination of alphanumeric characters. Versions that begin with XJDE or ZJDE are delivered with the PeopleSoft EnterpriseOne system.

Setting Up Routing Information

When you set up routing information, you can direct cases to provider groups in the order that you determine as the most logical.

This section provides an overview of routing sequences and rules and discusses how to set up:

- Routing sequence
- Routing rules

Understanding Routing Sequences and Rules

Use routing sequence to manage the order that a case is routed to provider groups. Use routing sequence to define how the system searches through the routing rules to determine the provider group to which an incoming case is directed.

Use routing rules to define the prescribed path for assigning cases to the proper provider groups. You might assign cases to certain provider groups or individuals based on their knowledge of a product family or language.

Through the Routing Rules form, you can assign cases to a provider group or person based on any of the following or any combination of the following information:

- Customer Address Book number.
- Call center location.
- Product model.
- Product family.
- Environment.
- Address Book language code.
- Address Book geographic region code.

You can define the call center location in the Address Book for the service provider, the person entering the case. In the Address Book Revisions form, access the Address Book record for the service provider and enter the call center location in the Business Unit field.

See *PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook*, “Setting Up Service Management,” Setting Up Customers and Service Providers.

Forms Used to Set Up Routing Information

Form Name	FormID	Navigation	Usage
Case Provider Group Routing Rules Sequence	W17506H	Case Setup (G90CG), Provider Group Revisions On the Work With Provider Groups form, select Routing Sequence from the Form menu.	Define the order that the system uses to search for a match between the case and routing rules. The system uses a hierarchical search method, from most specific to most general. Record a number in the Sequence Number field and then enter Y in the fields that the system includes in the hierarchical search.
Case Provider Group Routing Rules Revisions	W17506G	On the Work With Provider Groups form, select Routing Rules from the Form menu.	Set up routing rules to direct cases to the proper provider groups. Specify either a person (assignee) or a provider group and then use any of the other active fields such as Product Model, Product Family, Environment, and so on, to determine the routing rule.

Setting Up Routing Sequence

Access the Case Provider Group Routing Rules Sequence form.

	Sequence Number	Product Model	Product Family	Environment	Customer Number	Language	Geographic Region	Case Center
<input checked="" type="radio"/>	1.00	N	N	N	Y	N	N	N
<input type="radio"/>	2.00	N	Y	N	N	N	N	N
<input type="radio"/>								

Case Provider Group Routing Rules Sequence form

Setting Up Routing Rules

Access the Case Provider Group Routing Rules Revisions form.

Customer Number	Customer Name	Case Center Location	Case Center Description	Product Model	Product Model Description	Product Family	Product Family Description
4270	Forest Gas Sta					ACCES	Accesories
						ACD	Automatic Call Dist.
						CABLE	Cable
						CBX	Computerized Branch E
						HEAD	Headset
						MODEM	Modem
						MON	Monitor
						PHONE	Phone Sets
						PRINT	Printer

Case Provider Group Routing Rules Revisions form (1 of 2)

Environment	Environment Description	Language	Language Description	Geographic Region	Geographic Region Description	Case Provider Group	Case Provider Group Name
						60000	Main Phone Provider Group
						60003	VIP Provider Group
						60000	Main Phone Provider Group
						60005	Phone Hardware
						60000	Main Phone Provider Group
						60001	Computerized Branch Exch. Pr
						60005	Phone Hardware
						60005	Phone Hardware
						60005	Phone Hardware
						60005	Phone Hardware

Case Provider Group Routing Rules Revisions form (2 of 2)

- Case Provider Group** Enter the Address Book number of the provider group if you are entering routing rules for provider groups.
- Assignee Number** Enter the Address Book number of the assignee if you are entering routing rules for an assignee.
- Product Model** Enter a value from UDC 17/PM that classifies an inventory item into a model.
- Product Family** Enter a value from UDC 17/PA that classifies an inventory item into a group.
- Environment** Enter a value from UDC 17/EN to define the operating environment of the user.
- Language** Enter a value from UDC 01/LP that specifies the language.
Before specifying a language, a language code must exist at either the system level or in the user preferences.
- Geographic** Enter a value from UDC 17/GR to specify the geographic region of the customer.

Setting Up Case Types

Set up case types to organize cases and then assign specific case types to provider groups.

This section provides an overview of case types and discusses how to set up generic and provider-group-specific case types.

Understanding Case Types

You can set up various case types, depending on how the organization receives cases. The types of cases might include:

- Facsimile
- Live telephone call
- Returned phone call
- Email

Set up generic case types to apply to all provider groups. You can then define specific case types for each provider group, as needed.

If you do not set up specific case types for a provider group, the values associated with the generic version of the case type are associated by default with the provider group.

You use the same form to set up generic and provider group-specific case types; however, the navigation to the form is different.

Forms Used to Set Up Case Types

Form Name	FormID	Navigation	Usage
Case Type Revisions	W17506C	Case Setup (G90CG), Provider Group Revisions On the Work With Provider Groups form, select Provider Group Type from the Form menu.	For generic case types, define the default Case Type from UDC 17/CT, Default Case Source from UDC 17/SC, and Resp Time (response time) for all provider groups.
Case Type Revisions	W17506C	On the Work With Provider Groups form, select the provider group and select Prdr Grp Types (provider group types) from the Row menu.	For provider group-specific case types, define the default case type from UDC 17/CT, Default Case Source from UDC 17/SC, and Resp Time (response time) for the selected provider group. Note. To define a case type, you must first create the case type value in the UDC 17/CT table.

Setting Up Generic and Provider-Group-Specific Case Types

Access the Case Type Revisions form.

Provider Group Revisions - Case Type Revisions

OK Delete Cancel Row Tools

Provider Group Number

Records 1 - 7 Customize Grid

<input type="checkbox"/>	Case * Type	Description	Default Case Source	Resp Time
<input checked="" type="radio"/>	1	Live	1	1.00
<input type="radio"/>	2	Call back	1	2.00
<input type="radio"/>	3	E-Mail	2	2.00
<input type="radio"/>	4	FAX	3	2.00
<input type="radio"/>	5	New - reference closed request	1	2.00
<input type="radio"/>	6	Web	4	2.00
<input type="radio"/>				

Case Type Revisions form

- Provider Group Number** For generic case types, this field is blank.
For provider-group-specific case types, the provider group number appears by default.
- Case Type** Enter a value from UDC 17/CT to specify the type of case.
- Default Case Source** Enter a value from UDC 17/SC to specify the source of a case.
- Resp Time (response time)** Enter a response time to define a guaranteed length of time when a consultant must respond to a case. This guaranteed response time is a component that is used to calculate commitment date and time, and escalation date and time if the case is not covered under a contract. This unit of time relates to the service type in the F1725 table. Enter the response time in hours.
-
- Note.** If a contract covers a case, then the contract response time overrides the response time on the Case Request Types Revisions form.
-

Setting Up Case Priorities Using Notification Escalation Method

This section provides an overview of priorities and escalations, and discusses how to set up generic and provider-group-specific priorities.

Understanding Priorities and Escalations

The escalation method that is defined in the S/WM system constants determines how you can set up case priorities in the system. For both escalation methods, you use the Work With Case Priorities form to define how the system escalates cases; however, the form contains different fields, and the form numbers are different.

Each time that the system escalates a case, it uses the detail data from the Case Priority Revisions form to calculate:

- New escalation date and time.
- Message level within the parent distribution list for sending messages.
- Priority.

When you enter a case, the escalation level is 1. The system locates the detail line containing an escalation level of 1. If the case is assigned, the system uses the Assigned Percentage value to calculate the escalation date and time. If the case is unassigned, the system uses the Unassigned Percentage field value to make the calculation. The system also uses the Commitment Date/Time value and the Response Time value in calculating the escalation time.

If you do not close the case by the escalation date and time, the system sends messages to individuals on the distribution lists, it changes the escalation level, and it calculates a new escalation date and time. The system continues to escalate the case and increment the escalation level until you close the case or until the system does not find a detail line containing the next escalation level.

You must define a generic priority that applies to all provider groups. You can specify an escalation process for each case priority (UDC 17/PR).

After you set up generic priorities, you can then set up priority values for each provider group. If a provider group does not have specific values assigned, the generic values apply by default.

You use the same form to set up generic and provider-group-specific priorities; however, the navigation to the form is different.

Forms Used to Set Up Priorities

Form Name	FormID	Navigation	Usage
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select Prdr Grp Priorities (provider group priorities) from the Form menu.	Review generic case priorities and commitment percentages. These values apply by default for all provider groups.
Case Priority Revisions	W17506I	On the Work With Case Priorities form, click Add.	Define the generic case priorities that are the default values for all provider groups. When you set priorities, the system updates the F1753 table.
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select a provider group and select Prdr Grp Priorities (provider group priorities) from the Row menu.	Review the specific case priorities and commitment percentages that apply to the provider group.
Case Priority Revisions	W17506I	On the Work With Case Priorities form, select the provider group and click Add.	Define the case priorities for the provider group. When you set priorities, the system updates the F1753 table. You can set up as many escalation levels as necessary. The system sends escalation messages until the issue is closed or until no more escalation levels exist.

Setting Up Generic and Provider-Group-Specific Priorities

Access the Case Priority Revisions form.

Provider Group

For generic priorities, this field is blank.

For provider-group-specific priorities, the provider group number appears by default.

Priority

Enter the level of severity pertaining to the customer issue.

Commit Percentage

Enter the percentage to use when calculating the escalation due time. The commit time is based on the case type. When a case is not covered under a contract, the system uses the value in this field to calculate escalation time.

Escalation Time = Current Time + (Commit Time × Percentage)

Escalation Level

Enter the status code used to track commitment to the customer or an escalation. The escalation level is derived from a case and must be greater than or equal to 1.

Message Level

Enter the message level. The message level is associated with the group number on the Address Parent/Child Revisions form and enables the system to determine who receives messages when the case is escalated.

Unassigned Percentage and Assigned Percentage

Enter the percentage to use when calculating the escalation due time.

$$\text{Escalation Time} = \text{Current Time} + (\text{Commit Time} \times \text{Percentage})$$

The commit time is based on the type of case. The percentage is based on the request priority and whether the request is assigned to an individual.

The system uses the unassigned percentage to calculate escalation date and time for unassigned cases. The formula is $\text{Escalation Date and Time} = \text{Commitment Date/Time} \times \text{Unassigned Percentage}$.

Note. For Assigned Percentage, the values in the percentage field can be over 100 percent because you can send escalation messages after the commit time has been reached.

Escalation Priority

Enter a value from UDC 17/PR to specify the escalation priority.

Setting Up Priorities Using Skill-Level Escalation Method

This section provides an overview of priorities and escalations, and discusses how to set up generic and provider-group-specific priorities.

Understanding Priorities and Escalations

The escalation method defined in the S/WM system constants determines how you can set up case priorities in the system. For both escalation methods, you use the Work With Case Priorities form to define how the system escalates cases; however, the form contains different fields, and the form numbers are different.

Using the values in the F1753 table, the system assigns and processes the case through the provider group members assigned to the case. The values in this table enable the system to determine how long a provider group member works on a case before the case is systematically escalated to the next highest level member of the provider group.

You must define a generic priority that applies to all provider groups. After you set up generic priorities, you can then set up priority values for each provider group. If a provider group does not have specific values assigned, the generic values apply by default.

You use the same form to set up generic and provider group-specific priorities; however, the navigation to the form is different.

Forms Used to Set Up Priorities

Form Name	FormID	Navigation	Usage
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select Prdr Grp Priorities (provider group priorities) from the Form menu.	Review generic case priorities and commitment percentages. These values apply by default to all provider groups.
Case Priority Revisions	W17506E	On the Work With Case Priorities form, click Add.	Define the generic case priorities that are the default values for all provider groups. When you set priorities, the system updates the F1753 table.
Work With Case Priorities	W17506J	On the Work With Provider Groups form, select a provider group and select Prdr Grp Priorities (provider group priorities) from the Row menu.	Review the specific priorities and their associated commitment percentages that are specified for the selected provider group.
Case Priority Revisions	W17506E	On the Work With Case Priority form, click Add.	<p>Define the case priority details for the provider group. When you create the priority and its details, the system updates the F1753 table.</p> <p>You can set up as many escalation levels as necessary. The system sends escalation messages until the issue is closed or until the case has been escalated to the highest skill level. If the case is still not closed a message is sent to the manager.</p>

Setting Up Generic and Provider Group-Specific Priorities

Access the Case Priority Revisions form.

Provider Group Revisions - Case Priority Revisions

OK Cancel Tools

Provider Group	<input type="text" value="60001"/>	<i>Computerized Branch Exch. Queu</i>
Issue Priority	<input type="text" value="1"/>	<i>Critical</i>

Commit Percentage	<input type="text" value="90"/>	
Escalation Percentage	<input type="text" value="95"/>	
Escalation Warning Percentage	<input type="text" value="80"/>	
Resolution Warning Percentage	<input type="text" value="90"/>	
Escalation Start Percentage	<input type="text" value="90"/>	

Case Priority Revisions form

Provider Group For generic priorities, this field is blank.
 For provider-group-specific priorities, the provider group number appears by default.

Issue Priority Enter a value from UDC 17/PR to specify the issue priority.

Commit Percent Enter the percentage to use when calculating the escalation due time. The commit time is based on the case type. When a case is not covered under a contract, the system uses the value in this field to calculate escalation time.

$$\text{Escalation Time} = \text{Current Time} + (\text{Commit Time} \times \text{Percentage})$$

Escalation Percentage Enter the percent of the total response time scheduled to elapse between each of the case’s escalation intervals. An escalation interval is the time that lapses between the case’s assignment to a provider group member and the case’s escalation to the provider group member with the next highest skill level.

For example, if you enter 25 in this field and the response time for the case is 4 hours, the first skill level assigned to this case will have the case for one hour and each skill level thereafter will have the case for 1 hour until the response time is depleted.

Escalation Warning Percentage Enter the percent of the current escalation interval that remains when the assignee is warned about an upcoming escalation to another provider group member.

For example, if you enter 25 in this field and the provider group member has the case for an hour, the system generates and delivers a warning message 15 minutes before the case is escalated to the next skill level.

Resolution Warning Percentage Enter the percentage of the entire escalation routine that remains when the current assignee is warned about an upcoming escalation to the provider group manager.

For example, if you enter *10* in this field and the response time is 4 hours (240 minutes), the assignee working on the case when 24 minutes remain receives a warning message.

Escalation Start Percentage Specify the percent of the response time assumed to have already lapsed or expired before the first escalation interval begins

For example, if you enter *10* in this field and the response time is 4 hours (240 minutes) the first provider group member assigned to the case will be assigned as soon as the case is created and saved, but the complete escalation interval will not begin until 24 minutes have elapsed.

Setting Up Processing Options for the Work With Provider Groups Program (P17506)

Processing options enable you to specify the default processing for programs and reports.

Versions

The processing option on this tab defines the version that the system uses when it calls this program:

1. Address Book MBF (10100041) Version (address book master business function (10100041) version) If you leave this processing option blank, the system uses the ZJDE0001 default version.

Default

The processing option on this tab defines the default values that the system uses when you work with provider groups.

1. Document Type Specify the default document type for provider group revisions. *CL* (call) is the default. Change the default as needed.

Display

The processing options on this tab indicate the information that the system displays when you inquire on provider groups using this version of the Work With Provider Groups program.

1. Display Case Provider Groups or Work Order Provider Groups Specify which provider group the system displays. Values are:
 Blank: Work order provider groups.
I: Case provider groups.

CHAPTER 5

Understanding Case Management Billing

This chapter provides overviews of billing in Case Management, pricing methods, multicurrency in Case Management billing, and Case Management automatic accounting instructions (AAIs).

Note. This chapter is required if you bill for cases. You must complete the tasks discussed in this chapter to implement case billing.

Understanding Billing in Case Management

The typical billing process includes accumulating cases to bill, creating and printing invoices, and recording journal entries for income and receivables.

Case Management is integrated with the Accounts Receivable and General Accounting systems. The billing process in Service and Support Management is the same whether you are billing for contracts, service work orders, or cases. After you set up the billing details in Service or Support Management, the system runs the billing process, updates Accounts Receivable tables with invoice information, and updates General Accounting tables with revenue information.

Invoices are based on billable cases. The first step in the billing process is to accumulate billable cases. When you run the Case Workfile Generation report (R17675), the system finds the cases that are eligible for billing from the F1755 table and the F1760 table, and creates F4812 records.

See Also

PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook, “Understanding the Service Management Features,” Billing for Service Management

Prerequisite

Set up the distribution AAIs.

Understanding Pricing Methods

To enter billing information for a case, you can select one of these pricing methods:

- Flat rate
- Time and materials

For the flat rate method, define billing through the processing options for the Case Update program. You can specify the cost type, pricing unit, and pricing unit of measure.

For the time and materials method, define billing through the processing options for the Time Entry program (P17505). You can define whether the system generates time entry records in the F1760 table and one of these tables:

- F06116Z1
- F0911Z1

You can also specify the cost type, labor unit of measure (such as hours), and minimum hours.

See Also

[Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Processing Options for Case Management, page 19](#)

Understanding Multicurrency in Case Management Billing

If you work in a multicurrency environment, you can review and edit currency information as necessary. When you review currency information, these guidelines apply:

- If you do not activate multicurrency, the system does not display currency information fields on the billing information forms.
- If the currency code for the customer is the same as the base currency code (the currency code for the company), the Foreign option is disabled.
- The system retrieves the customer currency code from the customer number in the F03012 table.

If a currency code does not exist for this customer, the system retrieves the currency code from the company.

- The system retrieves the company number from the F0006 table.

If the value in the Company field is blank, the system uses company 0000. Then the system retrieves the base currency code from the F0010 table.

- The system uses the exchange rate, which you can override, to calculate the domestic amount.
- The currency fields are disabled if the case or time entry records have been billed.
- If you select the Foreign option, the system displays billable amounts in the customer’s currency.

Otherwise, billable amounts appear in the company’s currency.

Understanding Case Management Automatic Accounting Instructions (AAIs)

To bill cases and process business transactions properly, you must identify information about the account structure and specific account values. You define the account structure and specific account values by using AAIs. The system stores the AAI values in the F4095 table. Whenever a program performs an accounting function, it accesses this table.

Distribution AAIs define the rules that the Case Management system uses to interact with the general ledger. Accounting AAIs define the rules that the Case Management and the Accounts Receivable systems use to interact. When you define AAIs, you establish how the system processes transactions for various programs.

Case-related distribution consist of these AAIs :

- Calls Revenue (1747).

This AAI determines the credit account for billable cases. Accounting AAIs determine the debit side of revenue, also known as the trade accounts receivable account.

- Call Center Expense (1792).

This AAI determines the debit account for case time entry records that the system uploads to the F0911Z1 table or the F05116Z1 table.

- Accrual Call Center Cost (1793).

This AAI determines the credit account of costs for case time entry records that the system uploads to the F0911Z1 table.

Based on key fields, the system retrieves the General Ledger account to use when creating an entry in the F4812 table. The key fields are:

- Company.
- Doc Type (document type).
- G/L Category Code (general ledger category code).
- Cost Type.

Based on these key fields, the system creates journal entries by using:

- Branch/plant
- Object account
- Subsidiary

Hierarchy for General Ledger Class Codes for Cases

Based on the service type of the case, the system finds the Covered G/L Code (covered general ledger code) or the Non-Covered G/L Code (non-covered general ledger code) in the F1725 table. The system uses these general ledger (GL) codes to locate the appropriate distribution AAIs for amounts that are either covered or not covered by service contracts.

Based on the GL class code, company, and document type, the system creates an entry using the distribution AAIs. The entry consists of a business unit; an object; and optionally, a subsidiary. You can override the GL class codes.

Hierarchy for Responsible Business Unit for Cases

If the business unit of an AAI is blank, the system locates the responsible business unit, based on the value specified in the Responsible Business Unit field, which is located on the Case tab of the S/WM Constants form.

On the S/WM Constants form, you can select one of these tables for the system to use to locate the responsible business unit:

Inventory (F4117/F41171) Select this table for the system to use the branch/plant and item number on the case to find the responsible business unit in the F41171 table.

If the branch/plant field is blank, the system uses the item number on the case to find the responsible business unit in the F4117 table.

If the business unit exists in the F41171 or F4117 tables, the system uses the same business unit in the resulting accounting journal entry.

Prod Family/Model (F1791) (product family/model (F1791))	Select this table for the system to use the product model on the case detail line to find the responsible business unit in the F1790 table. If the business unit exists in the F1790 table, the system uses the same business unit in the resulting accounting journal entry.
Equipment (F1201)	Select this table for the system to use the equipment number on the case detail line to find the responsible business unit in the F1201 table. If the business unit exists in the F1201 table, the system uses the same business unit in the resulting accounting journal entry.
Customer Number (F0101)	Select this table for the system to use the customer number on the case detail line to find the responsible business unit in the F0101 table. If the business unit for the customer exists in the F0101 table, the system uses the same business unit in the resulting accounting journal entry.
S&WM Line Type (F1793) (service and warranty management line type (F1793))	Select this table for the system to use the customer number on the case detail line to find the responsible business unit in the F1793 table. If the business unit for the customer exists in the F1793 table, the system uses the same business unit in the resulting accounting journal entry.
S&WM Customer Number (F1797) (service and warranty management customer number (F1797))	Select this table for the system to use the customer number on the case detail line to find the responsible business unit in the F1797 table. If the business unit for the customer exists in the F1797 table, the system uses the same business unit in the resulting accounting journal entry.

Note. If you assign a project business unit to the responsible business unit in the F0006 table, the system uses the project business unit as the business unit for the account.

CHAPTER 6

Setting Up and Managing Scripts

This chapter provides an overview of scripting and discusses how to:

- Create script components.
- Create scripts.
- Manage scripts.

Understanding Scripting

A script is a predefined set of questions or statements that are joined together in a specific order and used to gather information from respondents. When the script is processed, which is known as runtime, a questioner follows the script and records the respondent's answers. Depending on the purpose of the script, the system can use the respondent's answers to score the script.

Before you can create a script, you must define its components in the proper sequence. Script components include:

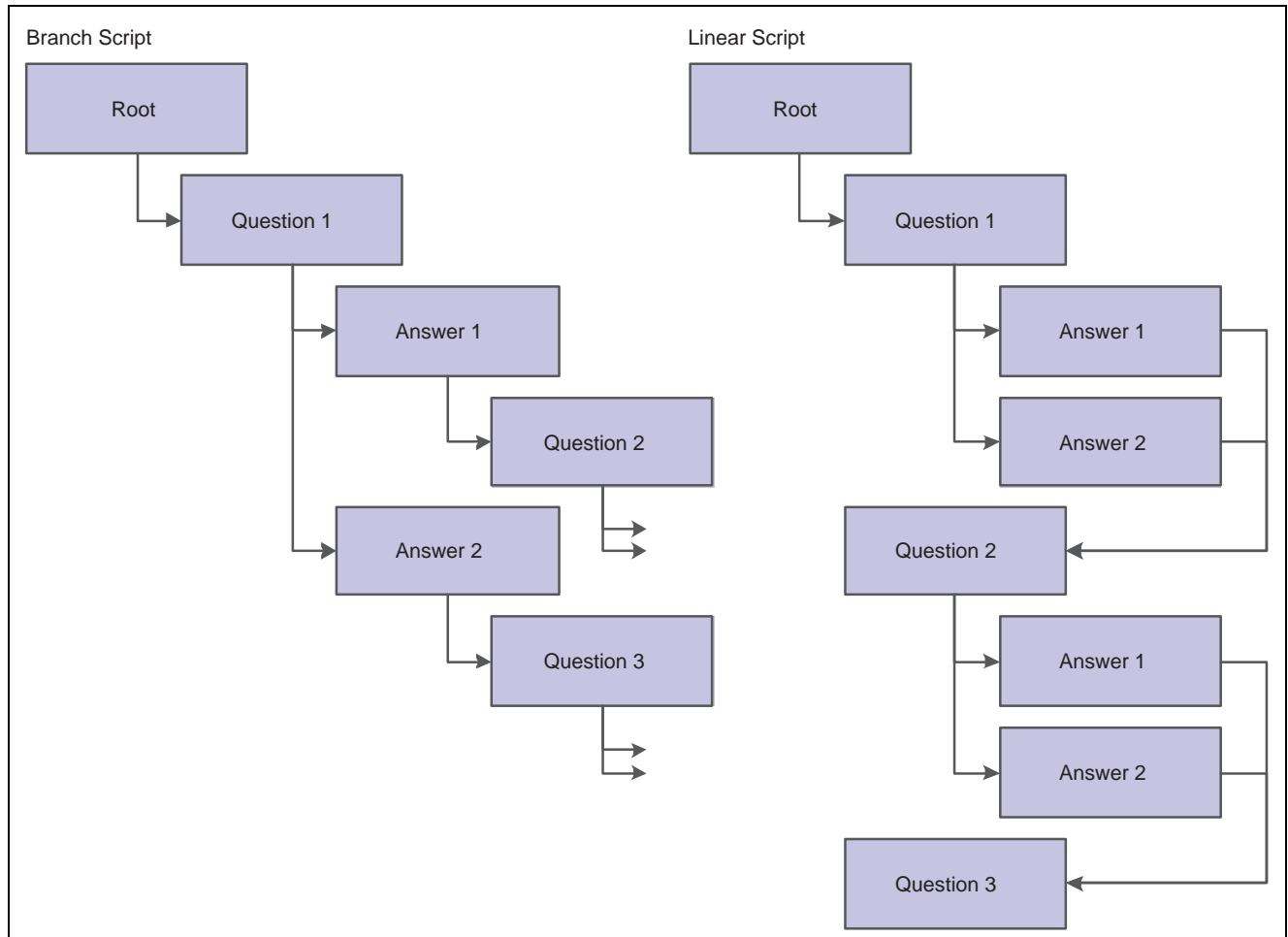
- Answer sets
- Variables
- Tokens
- Rate sets
- Questions

You do not necessarily use all components in every script; you use only the components that support the features that you want to include in the script. For example, you might choose not to use variables and tokens in a script.

After you have created script components, you can create scripts. Scripts can be either branch scripts, which use conditional logic to determine a sequence of questions, or linear scripts, which contain a fixed set of questions in a fixed order.

In a branch script, a script tree shows hierarchical relationships among questions. Questions are parents of answers, which are in turn parents of follow-up questions. Sibling nodes on the tree represent mutually exclusive paths through the script, so the questions that are asked depend on the answers that are provided.

In a linear script, the script tree hierarchy is flat. Questions are parents of answers, but answers have no children. Instead, all questions appear at the same hierarchical level. All questions are asked, and no branching logic is used. This diagram illustrates the difference between a branch script and a linear script:



Example of a linear and branch script

After you create scripts, you can validate them to verify that you have set them up correctly. When you validate a script, the system compares the script against one or more of three predefined rules to determine whether all nodes in the script tree are valid.

After you have created a valid script, you can clone the script. You might find this feature useful if you want to create several similar scripts. Using the cloning feature, you can create one script and clone it as many times as necessary. You can then change the cloned scripts so that they contain the information that is specific to that version of the script.

You can also translate scripts into multiple languages. You might find this feature useful if customer service representatives are working with the same issues in different countries. Using the translation feature, you can create one script and translate it into multiple languages, rather than creating multiple scripts to support each necessary language.

After you have created valid scripts, you can use them to solve work order or case-related issues. You can access scripts directly from work order and case entry forms, or by using Solution Advisor. When you find scripts that pertain to the issue that you are trying to resolve, you can attach an instance of each relevant script to the work order or case. When you attach a script instance to a work order or a case, you can run the script immediately; save the script to run in the future; or run a portion of the script, save the answers that are received from the respondent, and complete the script at a later time.

Creating Script Components

This section provides an overview of script components and discusses how to:

- Create answer sets.
- Attach answers to answer sets.
- Translate answers.
- Create variables.
- Create tokens.
- Create rate sets.
- Create questions.
- Translate questions.

Understanding Script Components

Before you can create a script, you must create the components, or building blocks, that you will use in the script. Script components include:

- Answer sets
- Variables
- Tokens
- Rate sets
- Questions

It is not necessary to create all components for each script. You can choose the components that you want to include in a script based on the purpose for the script. However, at a minimum, a script must contain answer sets and questions.

The components must also be set up in the correct sequence. You must create an answer set before you can create a question. You must also create a variable before you can create a token. This sequence is recommended when creating script components:

1. Answer sets (required)

An answer set must exist before you can create a single or multiple select question. When you create one of these types of questions, you must attach valid answers from an existing answer set.

2. Variables

Creating variables is optional. If you create variables, you must also create tokens; however, the variable must exist before you can create the token.

3. Tokens

Creating tokens is optional, unless you create variables. You must create tokens if you create variables.

4. Rate sets

Creating rate sets is optional. You create rate sets if you want to score the script each time it is processed. If you choose to create a rate set for a script, you can assign values to both the questions and answers that are associated with a script. The script is then scored, based on these values, and the score is compared to the rate set to determine the meaning of the score. You assign values to questions and answers when you create the questions; therefore, it is not necessary to create rate sets before you create answer sets. However, you must create the rate set before you create the questions.

5. Questions (required)

Regardless of which components you choose to include in the script, you must include questions. When you create questions, you attach valid answers for the question from existing answer sets. You can also use variables, tokens, and rate sets when creating a question.

Answers and Answer Sets

The first step in building a script is to create answer sets. Answer sets are groups of valid answers that you can associate with questions. You use the Answer Set program (P90CF030) to create answer sets. To create a valid answer set, you first create the answer set header, and then you can attach answers to the answer set. When you create an answer set, the system creates records in these tables:

- F90CF030
- F90CF040

For example, you might create an answer set called *Favorite Color*, and add these answers to the set:

- *Red*
- *Blue*
- *Green*
- *Yellow*

You can then use this answer set when building a script. For example, if you insert a question into the script, such as *What is your favorite color?*, you can attach any or all of the answers from the *Favorite Color* answer set to the question. When a user runs the script, the user asks the respondent what the respondent's favorite color is and chooses an answer from the answer set.

You can create default answers for an answer set. You might choose to do this if most respondents answer a question with the same answer. By setting an answer as the default, the system automatically selects this answer when the script is processed. Therefore, the user does not have to select this answer before continuing to the next question. However, the user can choose any of the other valid answers for the question before continuing to the next question. Using default answers can help minimize the number of mouse clicks a user must make when running a script. You can have only one default answer in an answer set.

You can also disable answers in an answer set. For example, if the answer set is a list of current products that the service department supports, and one of the existing products is no longer supported, you can disable the answer that corresponds to the product that is no longer supported.

You can also translate each answer in an answer set into multiple languages. If the organization deals with multilingual clients, prospects, or respondents, translating answers enables you to create one set of answers, and translate it into all necessary languages. When a user runs a script, they select the language in which they want the script to appear. If the answer is available in the selected language, the user sees the translated answer. If the answer is not available in the selected language, the system displays the answer in the language in which it was originally created.

When you translate answers, the system creates records in the F90CF03A table.

Lastly, you can assign a score to each answer. If you use a scoring system when you run scripts, you assign each answer a score. The system then calculates the total score of the script, based on the respondent's answers to all of the questions, and compares the total score to the value in the corresponding rate set.

For example, you might create a script that customer service representatives use when they receive a call. The questions and answers in the script are scored and used to determine the priority of the call. One of the questions might be to ask respondents how long they have been having the problem or issue. The answer set might include these answers and corresponding scores:

Time to Resolve (Answer)	Score
One day or less.	100
One week or less.	75
One month or less.	50
More than a month.	25

When the respondent chooses an answer, the system uses the score that is associated with the answer to calculate an overall score for the question. In this example, the answers with the shortest amount of time are given higher scores. The assumption is that if a problem has existed for a long period of time before the respondent places a call, it is not as critical as a problem that is reported at the time it occurs.

To calculate the script score, the system then adds the scores for each question in the script together. The script score is then compared to the rate set that is associated with the script to determine the meaning of the score.

Variables and Tokens

Variables and tokens are used to customize scripts based on respondents' answers. Variables and tokens enable you to replace generic values with values that are specific to the respondent. If you choose to use variables and tokens, you must use both of them. You cannot use variables without tokens, or tokens without variables.

You use the Variables program (P90CF080) to create variables and the Tokens program (P90CF070) to create tokens. The system updates these tables when you create variables and tokens:

- F90CF080
- F90CF070

If you choose to use variables and tokens, you must first create a variable. For example, you might choose to create the variable *Favorite Color*. You then create a token, which you might also name *Favorite Color*. You then associate the variable with the token.

After you have created the variable and token, you can then use them when creating questions. For example, you can associate the *Favorite Color* variable with the question: *What is your favorite color?* The answer that the respondent gives is then considered the value of the variable when the script is run. You can then use the *Favorite Color* token in subsequent questions to personalize the script for the respondent. For example, you might create the next question in the script as follows, using the *Favorite Color* token:

Would you be interested in purchasing <Favorite Color> widgets?

When a user runs the script, the token in the preceding question is replaced with the value that is associated with the *Favorite Color* variable. For example, if the respondent chose red as the favorite color, the preceding question appears as follows when the script is run:

Would you be interested in purchasing red widgets?

Rate Sets

Rate sets are used to provide meaning and context to a script score. When you create a script, you can assign values to the questions and answers in that script. As the respondent answers the questions in the script, the system scores the script based on those assigned values.

You use the Rate Set program (P90CF140) to create a rate set. When you create a rate set, the system creates records in these tables:

- F90CF140
- F90CF14A

To understand what the final script score means, you associate a rate set with the script. For example, you might create a script to determine the priority of an incoming call to the support department. When you create the script, you assign values to each question and answer in the script. As the representative completes the script, the system calculates the score using a numeric value. The system then compares the numeric score to the associated rate set to determine what the score means. This rate set might be used for this call priority script:

Script Score	Rate Set Value	Rate Set Score
40 or higher	Critical	40
25 to 39.9999	High	25
10 to 24.9999	Medium	10
0 to 9.999	Low	0

Therefore, if the final score for the script was 28, the system displays *High* next to the script score when the script is completed.

Questions

The last step in creating script components is to create script questions. You use the Question program (P90CF060) to create script questions. When you create questions, the system creates records in the F90CF060 table.

You can create these types of questions:

- Single select

The respondent can choose only one answer to this question. This question has a list of valid answers which are associated with an answer set. An example of a single select question might be *Are you calling about an existing issue?* Valid answers are *Yes* or *No*, and the user can choose only one.

- Multiple select

The respondent can choose one or more answers to this question. This question has a list of valid answers that are associated with an answer set. An example of a multiple select question might be *What are your three favorite colors?* Valid answers include a list of different colors, from which the respondent can choose three.

- Value input

The user can enter free-form text as the answer to the question. This question is not associated with a list of answers from an answer set. An example of a value input question might be *What is your address?* The user can enter the respondent's address as the answer to the question. You cannot assign scores to value input questions.

- Guide information

Guide information questions are statements that the user sees, and they do not require any answers. You might insert guide information questions periodically in a script to provide the respondent with information. An example of a guide information question might be *Thank you for this information. We're about half way through the survey now.* These questions are not associated with a list of answers from an answer set, and you cannot assign scores to them.

After you select the type of question, you can then enter the question and additional information about the question. You can provide a question hint, which helps users to understand the context in which a question should be asked or helps them determine the type of information that they are trying to receive from the respondent. For example, for the question *What is your address?*, you might include a hint that instructs users to gather the full address, including city, state, and zip code, so that they do not move on to the next question before gathering all of the necessary information.

You then associate the question, if it is a single or multiple select, with an answer set. When you build the script and insert the question, you can specify which answers in the answer set are available for this question in this script. The ability to select specified answers from an answer set enables you to create fewer answers sets. For example, you might create one answer set called *Colors*. This answer set can be used for any question where a respondent must choose a color, even if each question has a different set of valid colors to choose from. When you build the script, you can choose from the answer set only the colors that are associated with the current question.

You can also associate a variable with a question, or insert a token in the question or question hint text. If you associate a variable with a question, the answer to the question is used as the value for that variable. That value is then used to replace the associated token in subsequent questions. For example, you might create the question *What is your favorite color?* and associate that question with the *Favorite Color* variable. If the respondent selects *red* as the answer, any subsequent questions that have the *Favorite Color* token display the word *Red* in place of the token. For example, if the next question is *Would you be interested in purchasing <Favorite Color token> widgets?*, the system displays the question as follows, replacing the token with the variable value:

Would you be interested in purchasing red widgets?

To insert a token into a question, you click the Display Token link to display a list of available tokens. The tokens are displayed in alphabetical order. You can copy and paste the token from the Display Token area of the form into the question text.

Lastly, you can translate questions into multiple languages. If the organization deals with multilingual clients, prospects, or respondents, translating questions enables you to create one set of answers, and translate it into all necessary languages. When users run a script, they select the language in which they want the script to appear. If the question is available in the selected language, the user sees the translated question. If the question is not available in the selected language, the system displays the question in the language in which it was originally created.

When you translate a question, the system creates a record in the F90CF06A table.

User Defined Codes for Scripting

Before you begin creating scripts, you should familiarize yourself with the user defined code (UDC) tables that are used by the Branch Scripting system. Though many of these UDC tables can be changed to accommodate organizational requirements, these UDC tables contain values that are critical to the Branch Scripting system and should not be modified:

- 90CF/AS — Answer Set.
- 90CF/IS — Script Instance Status.
- 90CF/QT — Question Type.

- 90CF/SC — Script Category.
- 90CF/ST — Status.
- 90CF/VT — Variable Type.

Forms Used to Create Script Components

Form Name	FormID	Navigation	Usage
Search for Answer Sets	W90CF030A	Scripting Setup (G90CF), Answer Set Definition	Select existing answer sets, or access forms to create new answer sets.
Add Answer Set	W90CF030C	Click Add on the Search for Answer Set form.	Create an answer set.
Answer Set—Manage <Answer Set Name>	W90CF030D	Click Save and Continue after creating the answer set header.	Attach answers to an answer set, and translate answers.
Search for Variables	W90CF080A	Scripting Setup (G90CF), Variable Setup	Review existing variables, or access forms to create new variables.
Add Variable	W90CF080B	Click Add on the Search for Variables form.	Create a variable.
Search for Tokens	W90CF070C	Scripting Setup (G90CF), Token Setup	Review existing tokens, or access forms to create new tokens.
Add Token	W90CF070B	Click Add on the Search for Tokens form.	Create a token.
Search for Rate Set	W90CF140B	Scripting Setup (G90CF), Rate Set Definition	Review existing rate sets, or access forms to create new rate sets.
Add Rate Set	W90CF140C	Click Add on the Search for Rate Sets form.	Create a rate set.
Search for Questions	W90CF060A	Scripting Setup (G90CF), Question Definition	Select existing questions, or access forms to create new questions.
Add Question	W90CF060B	Click Add on the Search for Questions form.	Create a question.
Question – Manage <Question Name>	W90CF060C	Select a question on the Search for Questions form.	Translate questions.

Creating Answer Sets

Access the Add Answer Set form.

Answer Set Definition - Add Answer Set

Answer Set ID

Answer Set Name *

Inactive

Description

Updated Date/Time Updated By

Add Answer Set form

After you create the answer set, click **Save and Continue**, and then proceed to the next task to attach answers to the answer set.

Answer Set ID Review this field after you save the answer set to see the unique identification number that the system assigns to the answer set using Next Number functionality.

Inactive Select this option to make the answer set inactive. If you select this option, the answer set will not be available for use for any questions that you create after you select this option and save the answer set. However, selecting this option does not affect questions that already use the answer set.

Attaching Answers to Answer Sets

Access the Answer Set - Manage <Answer Set Name> form, Answer Set tab. Click the Detail link.

Answer Set Definition - Answer Set - Manage YesMaybeNo

Answer Set | **Related Objects**

Detail | [Translation](#)

Save Changes **Undo Changes** **Close**

Answer Set ID: 68

Answer Set Name...: YesMaybeNo

Inactive:

Description: Use for questions with Yes, No, or Maybe answers

Updated Date/Time: 21/06/05 Updated By: MT5961687

Answers

Set Default **Clear Default** **Delete**

Records 1 - 5

	Default	Sequence *	Disabled	Answers *	Answer Score	Updated Date/Time	Updated By
<input type="radio"/>	N	1	<input type="checkbox"/>	Yes	100.00	21/06/05 18:29:10 UTC	MT5961687
<input type="radio"/>	N	2	<input type="checkbox"/>	Maybe	50.00	21/06/05 18:29:17 UTC	MT5961687
<input type="radio"/>	N	3	<input type="checkbox"/>	No	5.00	21/06/05 18:29:28 UTC	MT5961687
<input checked="" type="radio"/>		4	<input type="checkbox"/>				
<input type="radio"/>			<input type="checkbox"/>				

Answer Set - Manage <Answer Set Name> form: Answer Set tab: Detail link

Set Default

Select an answer and then click this button to mark the answer as the default answer for the answer set. You can have only one default answer per answer set.

Clear Default

Select an answer that is currently marked as the default answer, and then click this button to clear the default option from the answer. It is not necessary to clear the default before changing the default answer. When you select an answer and click the Set Default button, the system automatically clears the default setting from the existing default and sets the new answer as the default. Use this option to clear the default if you no longer want the answer set to have a default answer.

Disable

Select this option if you no longer want this answer to be available to users when building scripts. When you select this option, this answer is no longer displayed as a valid answer during script creation. However, the system continues to display the answer for scripts that currently include this answer. To stop the answer from appearing in any scripts, you must remove the answer from each script that currently uses the answer. You can view a list of questions that currently use the answer set on the Related Objects tab.

Answer Score

Enter the numeric value that the system uses to calculate the score for the corresponding question. The system:

Totals the question weight value of each question in a script, and then divides the total by the number of questions that have a question weight in the script to determine the question percentage for each question.

Multiplies the question percentage by the answer score of the selected answer to determine the score for the question.

Totals the score for each question in the script to determine the script score.

Compares the script score to the rate set that is associated with the script to determine the meaning of the script score.

Translating Answers

Access the Answer Set - Manage <Answer Set Name> form, Answer Set tab. Click the Translation link.

Answer Set Definition - Answer Set - Manage YesMaybeNo

Answer Set | Related Objects

Detail | **Translation**

Save Changes | Undo Changes | Close

Answer Set ID: 68 | Answer Set Name: YesMaybeNo

Language: Portuguese

Answer Value: 143
Maybe | Translated Answer Value: Talvez

Updated Date/Time: | Updated By: |

Answer Translations

Edit | Delete

Records 1 - 1

	Answer ID	Original	Language	Translation
	142	Yes	Portuguese	Sim

Answer Set - Manage <Answer Set Name> form: Answer Set tab: Translation link

- Language** Select the language into which you want to translate the answer.
- Answer Value** Select the answer from the answer set that you want to translate.
- Translated Answer Value** Enter the translated text of the answer.
- Save Changes** Click this button to save the translated answer. The system creates a record in the detail area that lists the answer, language, and translated value. You can then edit or delete the record if necessary.

Creating Variables

Access the Add Variable form.

Variable Setup - Add Variable

OK Cancel Tools

Variable ID

Variable Name *

Type * String

Description

Updated Date/Time

Add Variable form

After you enter the variable, click OK to save the information, and then click Cancel to exit the form.

Type Enter a value to specify whether the variable is a numeric or text variable. If the variable is a numeric value, enter *I* (integer). If the variable is a text value, enter *S* (string). Values are stored in UDC 90CF/VT.

Creating Tokens

Access the Add Token form.

Token Setup - Add Token

OK Cancel Tools

Token ID

Token Name *

Description

Token Variable Name * Favorite Color

Updated Date / Time Updated By

Add Token form

After you enter the token, click OK to save the information, and then click Cancel to exit the form.

Token Name Enter a descriptive name for the token. The name that you choose should be easy to find in an alphabetical search. When you insert tokens into questions, you cannot search for tokens using a query by example (QBE) line. You select tokens from an alphabetical list. Also, because variables and tokens are closely linked, you might want to consider naming tokens and their associated variables with the same name.

Variable Name Enter the name of the associated variable that is used to hold the value that you want to use to replace the token. For example, if the token that you are creating is used to display the respondent's favorite color, enter the variable that is associated with the question *What is your favorite color?* in this field.

Creating Rate Sets

Access the Add Rate Set form.

Rate Set Definition - Add Rate Set

OK Cancel Tools

Rate Set ID

Rate Set Name *

Description

Updated Date / Time Updated By

Add Rate Set form

After you complete the Rate Set Name and Description fields, click OK, and enter the values that are associated with the rate set in the detail area of the form. After you enter values in the detail area, click OK to save the information, and then click Cancel to exit the form.

Rate Set Definition - Rate Set - Manage Credit Score Qualification

OK Delete Cancel Tools

Rate Set ID

Rate Set Name *

Description

Updated Date / Time Updated By

Records 1 - 3 [Customize Grid](#)

	Rate Value *	Rate Score	Updated Date / Time	Updated By
<input type="radio"/>	Credit Denied	0.00	21/06/05 18:41:51 UTC+00:00	MT5961687
<input type="radio"/>	Credit Approved	100.00	21/06/05 18:41:56 UTC+00:00	MT5961687
<input checked="" type="radio"/>	<input style="width: 80px;" type="text"/>	<input style="width: 80px;" type="text"/>		

Rate Set - Manage <Rate Set Name> form

Rate Value

Enter the text value that you want to appear in the script when the system scores the script. For example, if you run a script to determine call priorities, you might want a particular script score value, or range of values, to be associated with critical priority calls. Therefore, enter *Critical* in this field.

Rate Score

Enter the lowest script score that is associated with this rate value in this field. For example, if you want scripts with a score of 0 through 9.999 to be associated with low priority calls, and scripts with a score of 10 or more to be associated with high priority calls, you might create two rate values, *Low* and *High*. You then enter *0* for the rate value of *Low*, and *10* for the rate value of *High*.

Creating Questions

Access the Add Question form.

Question Definition - Add Question

Save and Close
Save and Continue
Save and Add New
Cancel

Question ID

Question Name *

Question Type * *Single Selection*

Question Weight

Question *

Question Hint

Answer Set ID * *Colors-JSA*

Variable ID *Favorite Color*

[Hide Token](#)

Updated Date/Time Updated By

Save and Close
Save and Continue
Save and Add New
Cancel

Add Question form

Question Type

Determine the type of question that you want to create. The question type is determined by the answers the respondent is allowed to give. For example, if the respondent can choose only one answer, create a single select question. Values are stored in UDC 90CF/QT, and include:

- G: Guide information
- M: Multiple select
- S: Single select
- V: Value input

Question Weight

Enter the value that is associated with the question. This value is used to determine the score of the script in which the question is included. Typically, the most important questions in the script have a higher weight than the least important questions. You can enter question weights for single and multiple select questions only. The system:

	Totals the question weight value of each question in a script, and then divides the total by the number of questions that have a question weight in the script to determine the question percentage for each question.
	Multiplies the question percentage by the answer score of the selected answer to determine the score for the question.
	Totals the score for each question in the script to determine the script score.
	Compares the script score to the rate set that is associated with the script to determine the meaning of the script score.
Answer Set Name	Select the answer set that contains the valid choices for this question. When you create the script, you can specify which answers from the associated answer set appear to the user when the script is run.
Variable ID	Enter the identification number of the variable that you want to hold the value of the respondent's answer. This value can then be used to replace the token that is associated with this variable in subsequent questions. Using tokens and variables enables you to personalize questions based on the responses that are received.
Display Token	Click this link to display a list of available tokens. Tokens appear in alphabetical order. For a token to be valid, you must have used the associated variable in a question that appears in a script before this question. For example, if you use the <i><Favorite Color></i> token in the current question, you must have used the <i><Favorite Color></i> variable in a previous question. The variable is used to store the value that the system uses to replace the token. If no variable is used, no value exists to replace the token, and a user will see the token, rather than the variable value, when running the script.

Translating Questions

Access the Question – Manage *<Question Name>* form, Question tab. Click the Translation link.

Language	Select the language into which you want to translate the question.
Translated Question	Enter the translated text of the question in the specified language.
Translated Question Hint	Enter the translated text of the question hint in the specified language.
Save Changes	Click this button to save the translated text. The system creates a record in the detail area that lists the translated question, translated question hint, and language. You can then edit or delete the record if necessary.

Creating Scripts

This section provides an overview of script creation and discusses how to:

- Create a script header.
- Create a linear script.
- Create a branch script.
- Validate a script.

- Translate a script exit message.
- Clone a script.

Understanding Script Creation

After you have created script components, you can use them to build scripts. Scripts are predefined sets of questions or statements that are joined together in a specific order, and used to gather information from respondents. Using the Script program (P90CF160), you first create a script header. After you save the script header, you can create these types of scripts using the Script Related Re-usable Subforms program (P90CFSUB):

- Linear scripts

Linear scripts are fixed sets of questions or statements that are arranged in a fixed order. Questions are the same for each respondent, regardless of the answers given.

- Branch scripts

Branch scripts are more complex than linear scripts. They include conditional logic that determines which questions appear, based on the respondent's answers.

When you create a script, the system creates records in these tables:

- F90CF160
- F90CF170

Scripts can be used to:

- Solve problems
- Capture information
- Fulfill requests
- Evaluate potential

Scripts can help an organization streamline and standardize information gathering processes, which in turn facilitate greater accuracy and consistency of data. Scripts provide repeatable processes that can help an organization increase efficiency and lower training time and costs. Scripts can help an organization simplify the diagnoses of complex issues, enabling less experienced employees to mirror the skill level of more experienced employees. You can also use tokens and variables within questions to configure scripts according to a respondent's answers.

You can also translate the exit message for a script into multiple languages. When a user runs the script, the exit message appears in the selected language if a translation in that language is available. If no translation is available in that language, the exit message appears in the language in which it was originally created. When you translate an exit message, the system creates a record in the F90CF16C table.

When you create a script, you can assign it a script type. Script types are used to classify different types of scripts, which can facilitate searching for scripts. You can create as many script type codes as necessary to meet the needs of the organization. Script type codes are stored in UDC 90CF/TY, and include values such as:

- Configure order
- Contact questionnaire
- Product advisor
- Troubleshooting guide

Scoring Scripts

Depending on the purpose of the script, you might choose to score the script based on the respondent's answers. You can score both linear and branch scripts. For a script to be scored, at least one of the questions in the script must contain a question weight, and the answer to that question must have a score value.

You must also associate a rate set with the script. The rate set is used to put the script score in context. For example, a script score of 10 does not necessarily tell a user anything about the respondent's situation. Therefore, the system associates the script score with the corresponding value in the rate set to give the score meaning. For example, the value of 10 might correspond to *High Priority* in the rate set that is associated with one script, but might correspond to *Low Priority* in the rate set that is associated with another script.

The system performs these steps to calculate the score of a script:

1. The system totals the question weight value of each question in a script, and then divides the total by the weight of each question in that script that has a question weight, to determine the question percentage for each question.
2. The system multiplies the question percentage by the answer score of the selected answer to determine the score for the question.
3. The system totals the score for each question in the script to determine the script score.
4. The system compares the script score to the rate set that is associated with the script to determine the meaning of the script score.

Scripting Trees and Nodes

When you build a script, the system displays the questions and answers in a hierarchical tree structure to help you identify parent, child, and sibling items, or nodes. A node is any line in the tree. There are four types of nodes:

- Root nodes

A root node is the first node in a script tree. Root nodes must be followed by a question node. The system automatically creates the root node when you save the script header.

- Question nodes

Question nodes are the questions in a script. Question nodes must be followed by one or more answer nodes or any nodes, with one exception:

You do not need to follow a guide information question in a linear script with an any node or an answer node.

For example, if you insert a single select question into a script, you must follow it with one or more answer nodes. Question nodes can follow an answer node or an any node.

- Answer nodes

Answer nodes are children of their associated question node. Each answer node represents a valid answer choice for the question. You use answer nodes after single or multiple select questions. You can follow a set of answer nodes with an any node or a question node.

- Any nodes

Any nodes are used to direct the script when no answer nodes, or multiple answer nodes, are chosen. Any nodes can follow a question or answer node. Any nodes are children of their associated question node.

You must include an any node in these situations:

- In branch or linear scripts, an any node must follow a value input question.

You cannot put an answer node after this question type, and you cannot follow a question node with another question node. Therefore, you insert an any node to direct the system to the next question in the script.

- In a branch script, an any node must follow a guide information question, unless that question is the last question in the script.

You cannot put an answer node or another question node directly after a guide information question node in a branch script.

- In a branch script, if a question has one or more answers with a follow-up (child) question, but not all of the questions have a follow-up question.

The any node directs the system to the next question in the script if the user chooses one of the answers that does not have a follow-up question. For example, you might ask respondents what their favorite color is, and allow them to choose from red, blue, yellow, or green. Your organization has bright red and maroon products. Therefore, if the respondent chooses red, you might ask a follow-up question such as *Do you prefer bright red or maroon?*

However, if the respondents answered that their favorite color was blue, yellow, or green, and you offer only one type of blue, yellow, or green product, you might not include follow-up questions for those answers. Therefore, in addition to inserting answer nodes for red, yellow, blue, and green, you must insert an any node for this question. The any node directs the system to the next question in the script if an answer with its own path is not chosen. If the respondent chooses red, the system brings the user to the next question under the red path. However, if the respondent chooses yellow, there is no path to follow that is associated with the yellow answer. Therefore, the system uses the any node to direct the user to the next question in the script.

- In a branch script, an any node must follow a multiple select question.

If a single answer is selected, the system follows the branch that is associated with that answer node, if one exists. If the answer node does not have its own branch, the system follows the any node. Additionally, if multiple answers are selected, it is possible that each of those questions has a separate branch. Therefore, when multiple answers are selected, the system follows the any node. The any node directs the system to the next valid question in the script. The system disregards the paths of the selected answer nodes if multiple answers are selected, as each path might be different.

When you build scripts, you use the Add Question, Add Answers, Add Any Node, and Delete Node buttons to add nodes to the tree or remove them from the tree. To prevent you from adding nodes in the wrong location, these buttons are enabled and disabled depending on the user's location in the tree. For example, by disabling the Add Question button, the system does not allow you to enter a question node directly after another question node.

Warning! If you delete a node in the tree, the system deletes the selected node *and all of its children*. Therefore, you should carefully plan the script before you begin entering it to avoid deleting portions of the script. Also, you should validate the script often. When you validate the script, the system runs through the script from the top, and notifies you of any errors in the script. The more often you validate, the more likely it is that you identify and fix an error before it becomes necessary to delete large portions of the script.

Validating Scripts

As you create scripts, or after you have finished creating scripts, you can validate them to ensure that the script does not contain any errors, loops, or dead ends. The system includes these predefined validation rules:

- Rule 1 — Single select questions must be followed by at least one branch node.
- Rule 2 — Multiple select questions must be followed by at least one branch node.
- Rule 3 — Value input questions must be followed by at least one branch node.

You can choose to run any or all of these three rules when you validate the script. If the system finds an invalid node in the script, it displays the node that is in error, along with the rule that the node failed to pass. The system then marks the script as inactive.

Run the validation process often during script creation to identify and fix errors early and to avoid having to delete significant portions of the script.

Tips for Creating Linear Scripts

Linear scripts are used when all respondents are asked the same questions, regardless of their answers. When you create a linear script:

- Be aware of the hierarchy level when inserting nodes into a tree.

For linear scripts, you cannot insert questions as children of answer nodes. All questions in a linear script must be at the same hierarchical level. Therefore, to add a question node to a linear script, you must select the question node after which you want the new question to appear. Do not select the last answer node of the question under which you want the new question to appear. The system disables the Add Question button when you select an answer node.

- The rules for any nodes are different in linear and branch scripts.

It is not necessary to insert an any node after a guide information question in a linear script. The system allows you to enter question nodes directly after a guide information question node when you are creating a linear script.

Tips for Creating Branch Scripts

Branch scripts can be complex due to the fact that you can create several different paths within a single script. Be aware of these items when creating branch scripts:

- Be aware of the hierarchy level when inserting nodes into a tree.

When you select a node, and click one of the Add buttons, the system adds the node as a child of the selected node. To add a question at the end of the script, you select the last node in the tree and click the Add Question button. However, if the last node in the tree is an answer node, the question that you add will be a child of that answer node.

If you do not want the next question to be a child of one of the answer nodes (and therefore, only asked to respondents who choose that answer), you must insert an any node at the end of the tree, and then insert the question as a child of the any node. The any node directs the system to the next question when the respondent picks multiple answers or picks a single answer that does not have its own path.

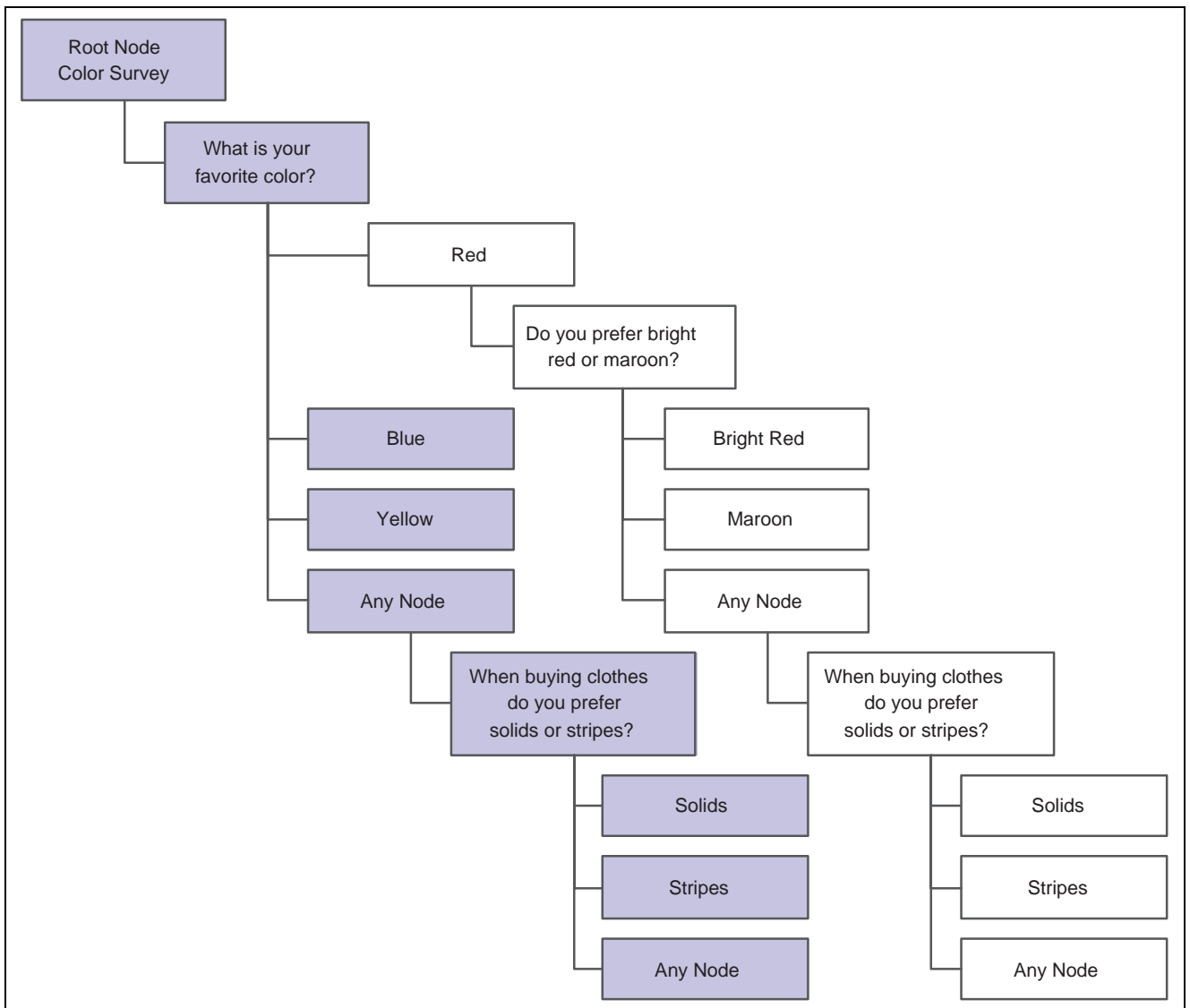
- Be aware that when you begin down a specific path, the system continues down that path and does not return to questions that are at higher hierarchical levels.

For example, you might ask respondents their favorite color at the beginning of the script. The three available answers are red, blue, and yellow. If the respondents pick red, you might ask them whether they prefer bright red or maroon. However, if the respondent picks blue or yellow, there are no follow-up questions that are associated with those answers.

In this situation, even if the next question for all respondents is the same, you must insert it into the script in two places: once for the respondents who choose blue or yellow, and once for the respondents who chose red and were directed to the follow-up question about the type of red. Because the system branched out into the red path, all subsequent questions for red respondents must be children of the question regarding their preferred type of red. All subsequent questions for respondents who chose yellow or blue are children of an any node that falls under the favorite color question node.

Given this information, you might try to insert the questions that must be asked to all respondents at the top of the script before you begin creating separate branches.

This graphic illustrates an example of a simple branch script:



Example of a simple branch script

Cloning Scripts

If the organization uses scripts that are similar to each other, you can create one generic script and then clone the script as many times as necessary. You can then make changes to each script so that the scripts are specific to the business needs.

Adding Items to a Script

After you create a script, you can attach items to the script. You might choose to attach an item to a script if that script is used to solve issues that are associated with the item. Users can then search for scripts that are associated with that item when trying to resolve cases or work orders that are associated with the item. When you add an item to a script, the system creates a record in the F90CF16B table.

You add items to a script by using the Related Objects tab on the Script –Manage <Script Name> form.

Forms Used to Create Scripts

Form Name	FormID	Navigation	Usage
Search for Scripts	W90CF160E	Scripting Setup (G90CF), Script Entry	Select existing scripts, or access forms to create new scripts.
Add Script	W90CF160C	Click Add on the Search for Scripts form.	Create a script header.
Script – Manage <Script Name>	W90CF160B	Click Save and Continue on the Add Script form, or select the script header on the Search for Scripts form, and then click Select.	Create, validate, clone, or add items to a linear or branch script, and translate the final script message.

Creating a Script Header

Access the Add Script form.

After you create the script header, click Save and Continue to begin building the script. Proceed to the tasks in this section for further instructions.

Script Entry - Add Script

Script Detail

Script ID	<input type="text"/>	Effective Date	21/06/05 18:47:46 UTC+00:00
Script Name *	<input type="text" value="Call Priority"/>	Script Category *	<input type="text" value="L"/> <i>Linear Script</i>
Script Type *	<input type="text" value="TG"/> <i>Troubleshooting Guide</i>	Inactive	<input type="checkbox"/>
Visibility	<input type="text" value="AL"/> <i>All</i>		
Description	<input style="width: 100%;" type="text" value="Use this script to determine the priority of incoming calls."/>		

Rating Detail

Total Script Weight	<input type="text"/>
Rate Set	<input type="text" value="26"/> <i>Call Priority</i>

Exit Message

Last Question Message	<input style="width: 100%;" type="text" value="Now let me see how I can help you fix your issue."/>
-----------------------	---

Add Script form

Script Category Specify whether you are creating a branch script or a linear script. Values are:
B: Branch script
L: Linear script

Script Type Enter a value to specify the type of situation in which the script should be used. Use script types to separate scripts into meaningful categories. For

example, you might choose to create script type codes for each product area that the service department or call center supports. Values are stored in UDC 90CF/TY and include codes such as:

CO: Configure order

CQ: Contact questionnaire

LQ: Lead qualification

PA: Product advisor

TG: Troubleshooting guide

Visibility

Enter a value to specify whether you want this script to be available to internal users only or to internal users and self-service users as well. Values are stored in UDC 90CE/VI and include:

AL: All users

IN: Internal users only

Total Script Weight

Review this field after you add questions to the script to determine the total number of points that are associated with the script. This system populates this field with the total of the question weight of each question in the script.

Rate Set

Enter the rate set that is used to give meaning to the score of the script. When a user runs the script and enters a respondent's answers, the system scores the script instance. The system then compares the numeric score to the rate set to determine what the value means when associated with this script. For example, one rate set might classify a script score of 10 as *Low Priority*, and another rate set might classify a script score of 10 as *High Priority*.

Last Question Message

Enter the last question or statement that a user sees and reads when they reach the end of a script.

Creating a Linear Script

Access the Script – Manage <Script Name> form, Tree tab. Click the Detail link.

Script Entry - Script - Manage Call Priority Script

Script | **Tree** | Instances | Related Objects

Detail | [Validation](#)

Save Changes | Undo Changes | Clone | Close

Script Name: Preview Runtime

Script Category: *Linear Script*

Script Type: *Troubleshooting Guide*

Add Question | Add Answers | Add Any Node | Delete Node

Records 1 - 11 [Expand All](#) | [Collapse All](#)

Script Tree	
<input type="radio"/>	Call Priority Script
<input type="radio"/>	Thank you for calling the support center.
<input type="radio"/>	Any Node
<input type="radio"/>	Who am I speaking with?
<input type="radio"/>	Any Node
<input type="radio"/>	Can I have the phone number where I can reach you?
<input type="radio"/>	Any Node
<input checked="" type="radio"/>	Have you had this issue or problem before?
<input type="radio"/>	Yes
<input type="radio"/>	Maybe

Script - Manage <Script Name> form: Tree tab: Detail link

To create a linear script:

1. Select the root node, which contains the name of the script.
2. To add a question to the script, click the Add Question button.

The Question Information section appears on the form. You might need to scroll down to view this section on the screen.

3. In the Question Information section, select the question that you want to add to the script by populating the Question ID field.

The system displays the text of the selected question in the Question field.

4. To insert the selected question, click the Insert Selected Question button, or click Cancel, and then select a new question.

When you insert the question into the script, the system adds a question node to the script tree.

Note. You can create a new question at this point; click the Create New Question button. If you choose to create a new question here, you must complete steps 3 and 4 after you create the question to add it to the script.

5. In the script tree, select the question that you inserted.

If you inserted a single or multiple select question, click the Add Answers button, and proceed to the next step.

If you inserted a value input question, click the Add Any Node button. To add another question to the script, select the question node under which you want to insert a new question, click the Add Question button, and return to step 3 to continue building the script.

If you created a guide question, return to step 2 to continue building the script.

6. To add answer nodes to the question, scroll down to the Answer Set Information section of the form, select all of the answers that you want to attach to the question, and then click Insert Selected Answers.

The system inserts answer nodes for each selected answer under the associated question. To add another question to the script, select the question node under which you want to insert a new question, click the Add Question button, and return to step 3 to continue building the script.

Note. If necessary, you can create an answer set at this point; click the Create Answer Set button and complete the steps to create an answer set.

7. When you have finished adding all question, answer, and any nodes to the script, click Save Changes.
8. To preview the script, click the Preview Runtime button.

The system creates an instance of the script and runs the user through the script. When you have finished running through the script, click Finish. The system returns to the script tree.

9. Verify that all changes have been saved, and then click Close to exit the program.

Creating a Branch Script

Access the Script – Manage <Script Name> form, Tree tab. Click the Detail link.

Script Entry - Script - Manage Bike Troubleshooting Script

Script | **Tree** | Instances | Related Objects

Detail | [Validation](#)

Save Changes | Undo Changes | Clone | Close

Script Name: Preview Runtime

Script Category: *Branch Script*

Script Type: *Troubleshooting Guide*

Add Question | Add Answers | Add Any Node | Delete Node

Records 1 - 13 [Expand All](#) | [Collapse All](#)

Script Tree	
<input type="radio"/>	Are you having a problem with a mountain bike or a road bike?
<input type="radio"/>	Mountain Bike
<input type="radio"/>	What model is your mountain bike?
<input type="radio"/>	A500
<input type="radio"/>	A300
<input type="radio"/>	AX1000
<input type="radio"/>	Road Bike
<input checked="" type="radio"/>	What model is your road bike?
<input type="radio"/>	R1000
<input type="radio"/>	R5000

Script - Manage <Script Name> form: Tree tab: Detail link

To create a branch script:

1. Select the root node, which contains the name of the script.
2. To add a question to the script, click the Add Question button.

The Question Information section appears on the form. You might need to scroll down to view this section on the screen.

3. In the Question Information section, select the question that you want to add to the script by populating the Question ID field.

The system displays the text of the selected question in the Question field.

4. To insert the selected question, click the Insert Selected Question button, or click Cancel, and then select a new question.

When you insert the question into the script, the system adds a question node to the script tree.

Note. You can create a new question at this point; click the Create New Question button. If you choose to create a new question here, you must complete steps 3 and 4 after you create the question to add it to the script.

5. In the script tree, select the question that you inserted.

If you inserted a single or multiple select question, click the Add Answers button, and proceed to the next step.

If you inserted a value input or guide information question, click the Add Any Node button. Then, select the answer, question, or any node under which you want to insert a new question, and return to step 3 to continue building the script.

6. To add answer nodes to the question, scroll down to the Answer Set Information section of the form, select all of the answers that you want to attach to the question, and then click Insert Selected Answers.

The system inserts answer nodes for each selected answer under the associated question. If you added answer nodes under a multiple select question, you must insert an any node at the same level as the answer nodes before you can add any additional questions under that question. It is not necessary to insert an any node after a single select question.

To add another question to the script, select the answer, question, or any node under which you want to insert a new question, click the Add Question button, and return to step 3 to continue building the script.

Note. If necessary, you can create an answer set at this point; click the Create Answer Set button and complete the steps to create an answer set.

7. When you have finished adding all question, answer, and any nodes to the script, click Save Changes.
8. To preview the script, click the Preview Runtime button.

The system creates an instance of the script and runs the user through the script. When you have finished running through the script, click Finish. The system returns to the script tree.

9. Verify that all changes have been saved, and then click Close to exit the program.

Validating a Script

Access the Script – Manage <Script Name> form, Tree tab. Click the Validation link.

Script Entry - Script - Manage Bike Troubleshooting Script

Script | **Tree** | Instances | Related Objects

Detail | **Validation**

Close

Script Name: Bike Troubleshooting Script

Script Category: B Branch Script

Script Type: TG Troubleshooting Guide

Validation Rules

Rule 1 The single-type question node requires branch node

Rule 2 The multiple-type question node requires branch node

Rule 3 The value-input-type question node requires branch node

Validate Script

Tree is Valid

Script - Manage <Script Name> form: Tree tab: Validation link

Rule 1 Select this option if you want the system to validate that all single select question nodes are followed by at least one answer node.

Rule 2 Select this option if you want the system to validate that all multiple select question nodes are followed by at least one answer node.

Rule 3 Select this option if you want the system to validate that all value input question nodes are followed by at least one answer or any node.

Validate Script Click this button to validate the script against the selected rules. If the validation is successful, the system displays *Tree is Valid* under this button. If the script is not valid, the system displays a grid, listing all of the nodes that are invalid and the rule that the node failed to pass.

Translating a Script Exit Message

Access the Script – Manage <Script Name> form, Script tab. Click the Translation link.

Script Entry - Script - Manage Bike Troubleshooting Script

Script | Tree | Instances | Related Objects

Detail | Translation

Save Changes | Undo Changes | Close

Exit Message: Thank you. Have a nice day.

Language: Portuguese

Translated Exit Message: Muito obrigado. Tenha un bom dia.

Updated Date/Time: [] Updated By: []

Script - Manage <Script Name> form: Script tab: Translation link

Translated Exit Message

Enter the text of the exit message in the language that appears in the Language field, and then click Save Changes. The system adds the translated record to the detail area of the form. You can create translations in multiple languages, but you can have only one translation per language.

Cloning a Script

Access the Script – Manage <Script Name> form, Tree tab. Click the Detail link.

To clone a script:

1. Click the Clone button.
2. On Clone Script, enter the name of the new script in the Script Name field.
To return to the previous form without cloning the script, click the Return to Define Tree link before you click Clone.
3. To access the script tree of the newly created script, click the Return to Cloned Script link.
To return to the original script, click the Return to Define Tree link.
4. Update the script as necessary, save changes, and then click Close to exit.

Managing Scripts

This section provides an overview of script management, lists prerequisites, and discusses how to:

- Run a script for a case or work order using Solution Advisor.

- Run a script for a case or work order using Related Actions.

Understanding Script Management

After you have created valid scripts in all of the necessary languages, you can begin using those scripts to gather information and to assist in solving support calls and service work orders.

Scripts, Cases, and Work Orders

You use scripts to help solve open cases and work orders on which the support and service teams are working. Scripts can help support and service representatives diagnose issues by providing a list of questions and possible answers. For example, the script might ask callers what model of a given product they are using. Depending on the model selected, the script can then ask a series of questions that are specific to that product model. This table illustrates how a support representative might use a script to solve a case or work order:

Questions	Responses
What product is causing your issue?	I'm having trouble with the widgets that we purchased.
What model widget are you using?	I'm not sure.
Is it red or black?	Black.
Is it larger or smaller than a golf ball?	Smaller.
I believe you are using widget model 500A.	No response necessary, as this was a guide information question.
Are you using the 500A widgets in refrigerators or in freezers?	Refrigerators.
Does the widget appear to be loose?	Yes.
You'll need to tighten that up using a crescent wrench. That should fix your problem.	No response necessary, as this was a guide information question.

To use scripts to solve cases and work orders, you can use either the Solutions or the Related Actions tab to find and run scripts.

If you are using Solution Advisor, you can search for scripts by accessing the Advanced Search on the Solutions tab of the case or work order. When you find the script that you want to run, click the script ID to run the script. The system creates an instance of the script for the associated case or work order. You can then review all script instances on the Related Actions tab. To search from scripts using Solution Advisor, you must set up the Case Management constants.

See [Chapter 3, "Setting Up Case Management Fundamentals," Setting Up Case Management Constants, page 16.](#)

Alternatively, you can use the QBE search on the Related Actions tab to search for scripts. When you identify a script that you want to use, you can then select it and run it from the Related Actions tab.

Regardless of the method that you use to run the script, the system uses the Script Runtime program (P90CF180) to run the script.

See [Chapter 8, "Entering Cases," Entering and Reviewing Related Actions, page 134.](#)

Script Instances

When you run a script, the system creates an instance of the script to hold the respondent's answers and comments. Each time you run a script, the system creates a new instance. You can see all of the script instances that are associated with a case or work order by reviewing the Related Actions tab. When you associate and run a script from a case or work order, the system populates these tables:

- F90CF180
- F90CG503

When you run through a script instance, you can save information as you go; click the Save and Continue button. You can also save the instance as it is at the current time, and complete the script at a later time using the Save For Later button. While you are working with the script, you can return to previous answers and make changes. However, be aware that if you change an answer to a question in a branch script, the system deletes all of the information below that change. This is necessary because it is possible that changing an answer causes the script to include different questions than those that were asked before the answer was changed.

When you complete the script instance, you click the Finish button to save the script. After you click the Finish button, you cannot update answers in the script. However, if necessary, you can create another instance of the same script.

Related Objects

When you create a script, you can associate it with items that the organization supports, services, or sells. Items are considered related objects to a script. After you begin creating script instances from cases and work orders, the associated cases and work orders are also considered related objects.

You can review all of a script's related objects directly from the script. This information can be useful in determining how useful a script is. Reviewing the related objects shows you how many times the script has been used.

Prerequisites

Before you can run a script from a case or work order, you must complete one of these tasks:

- Create a case.
- Create a work order.

See Also

[Chapter 8, "Entering Cases," page 107](#)

PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook, "Managing Work Orders"

Forms Used to Manage Scripts

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry	Access existing cases, or access forms to enter new cases.
Manage Case	W90CG501J	Select a case on the Work With Case Management form, and click Select.	Access the Solution or Related Action tab to enter and review scripts that are associated with cases.
Search for Service Work Orders	W90CD020B	Daily Work Order Processing (G1712), Service Management Workbench	Access existing work orders and forms to enter new work orders.
Service Work Order – Manage <Work Order Name>	W90CD002B	Select a work order on the Search for Service Work Orders form, and click Select.	Access the Solution or Related Action tab to enter and review scripts that are associated with work orders.
Search for Scripts	W90CF160E	Scripting Setup (G90CF), Script Entry	Select an existing script.
Script – Manage <Script Name>	W90CF160B	Select a script on the Search for Scripts form, and then click Select.	Review script instances and related objects by selecting the Instances or Related Objects tab.

Running a Script from a Case or Work Order Using Solution Advisor

Access the Case Entry – Manage <Tab Name> form, Solution tab, or the Service Work Order – Manage <Work Order Name> form, Solutions tab. Click the Search link.

To run a script from a case or work order:

1. Click the Advanced Search link.
2. To search for scripts that are associated with the case or work order, select the Script option.
3. Enter key words in the Script Name and Description fields to assist in searching for scripts that are related to the issue, and choose the type of search for each (*Match All*, *Match Any*, or *Match Exact*).
4. If applicable, in the Item field, enter the item number that is associated with the issue to search for scripts that are also associated with that item.
5. Click Search and scroll to the bottom of the form to review a list of scripts that match the search criteria.
6. To create an instance of the script and associate it with the case or work order, click the ID link.
7. On Runtime for <Script Name>, the system prompts the user with the first question in the script.
8. Choose the answer and click Next to move to the next question in the script.

As the user progresses through the script, the system records the questions and answers on the left side of the form.

9. At any time during the script run, you can save the information; click the Save and Continue button.

You can also save the script instance to run at a later time; click the Save for Later button.

10. When you reach the end of a script, the Last Question Message appears, and you can click Finish to save the script instance.

Running a Script from a Case or Work Order Using Related Actions

Access the Case Entry – Manage <Tab Name> form, Related Actions tab, or the Service Work Order – Manage <Work Order Name> form, Related Actions tab.

To run a script from a case or work order using Related Actions:

1. From a case, select *Script* from the available options, and then click Add.
From a work order, click Add.
2. On the Select Script form, locate the scripts that are associated with the issue using the Script ID, Script Category, Script Name, and Visibility search fields.
3. Select the script that you want to run, and then click Select.
4. On Runtime for <Script Name>, the system prompts the user with the first question in the script.
5. Choose the answer, and click Next to move to the next question in the script.
As the user progresses through the script, the system records the questions and answers on the left side of the form.
6. At any time during the script run, you can save the information; click the Save and Continue button.
You can also save the script instance to run at a later time; click the Save for Later button.
7. When you reach the end of a script, the Last Question Message appears, and you can click Finish to save the script instance.

CHAPTER 7

Setting Up Solution Advisor

This chapter provides an overview of Solution Advisor, lists a prerequisite, and discusses how to:

- Set up Solution Advisor user defined codes (UDCs).
- Create solutions.
- Create solution libraries.
- Update the usage and solved count.

Understanding Solution Advisor

Solution Advisor is a knowledge base application that assembles and classifies customer-specific information. The information is accessible by customers, as well as service and support agents, all of whom have the ability to search the knowledge base for an appropriate solution to a specific case or work order.

Solution Advisor comprises these components:

- Solutions
- Solution libraries
- Solution searches

Verity

Verity is a third-party software that enables you to perform advanced text searches of PeopleSoft EnterpriseOne data. Verity works in conjunction with Solution Advisor, and enables you to:

- View the relevance of each search result.

The system determines which search results most closely match the search criteria, and displays the relevance as a percentage in the Relevancy field. Typically, search results with high relevancy values are the most useful.

- Search text within media objects.

You can search the text in the media object notes that are attached to cases and work orders.

- Perform case-sensitive searches.
- Search for similar words.

For example, if you want to search cases or solutions related to item number R500A and R500B, you can search for R500, and see results for both items.

- Search using wildcards.

You can use * (asterisk) as a wildcard in words or phrases. For example, if you search for cases related to item number R500*, the system displays cases or work orders associated with items R500A, R500B and R5000.

To use Verity with Solution Advisor, you must define the data source for these business views:

- V90CE03A
- V90CE03B
- V90CE03C
- V90CE03D
- V90CE03E
- V90CE03F

You must also define text search properties for each business view, and build each search index. You can use either of these programs to build an index:

- Solution Advisor Search Index program (R90CE031).

This program builds an index for each of the six business views that Solution Advisor uses. Each time you run this program, the system replaces the existing indices with new, full indices for each business view.

- Text Search Build program (R958001).

This program builds an index for all business views that are set up for text searches. You can choose different versions of this program to create a full indices, optimize indices, or clear indices.

Whichever program you use to build indices, you must create a full build at least one time before you can search for solutions using Verity.

Note. The Solution Advisor Search Index program (R90CE031) is not located on a menu. To access this program, use batch versions, which you access by typing *BV* in the fast path.

See Also

For complete instructions about setting up Verity and indices, see the *EnterpriseOne Tools 8.95 PeopleBook: System Administration*

Prerequisite

Before you complete the tasks in this chapter, you must specify in the S&WM Constants Revisions program (P17001) that you are using Solution Advisor. You specify whether you use Solution Advisor on the Case tab and the Work Order tab.

See [Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Case Management Constants, page 16.](#)

See *PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook*, “Setting Up Service Management,” Setting Up Service Management Constants.

Setting Up Solution Advisor User Defined Codes (UDCs)

This section provides an overview of Solution Advisor UDCs and discusses the UDCs that you must set up to use solutions.

This table describes the UDC tables that you must set up for solutions:

UDC	Type of Data
90CE/AS	<p>Associated Solution Status</p> <p>Define the solution status. The system uses this UDC table in the Status field on the Attempted Solutions form, which is accessed from the Solutions tab on the Case Entry form. Do not change the UDC values that are already set up in this table because the system uses these values for processing. You can change the value descriptions and add additional values, as needed.</p>
90CE/SS	<p>Solution Detail Status</p> <p>Define the solution status. Do not change the UDC values that are already set up in this table because the system uses these values for processing.</p>
90CE/ST	<p>Solution Detail Type</p> <p>To facilitate searching, further define the type of solution.</p>
90CE/VI	<p>Solution Detail Visibility</p> <p>Define the solution visibility. Do not change the UDC values that are already set up in this table because the system uses these values to determine which solutions are visible to customers. Solutions with value <i>All</i> are visible to customers.</p>

Creating Solutions

This section provides an overview of solutions and discusses how to create a solution.

Understanding Solutions

Solutions are records of known resolutions that are created to assist agents or customers with an issue. Each solution record stores a number of attributes designed to help you locate the solution quickly or resolve the issue.

These solution attributes include this information:

- Summary description.
- Detailed description.
- List of symptoms that the solution can resolve.

- Set of key words commonly associated with the issue.

Only solution administrators have permission to manage and maintain the solution knowledge base. They are responsible for creating, updating, deactivating, and approving solutions.

Call center agents can search on and create new solutions when they attempt to resolve a case or work order. Initially, the new solution is specific to a single case or work order. Upon approval, the solution becomes part of the knowledge base, and is available to all agents for case or work order association.

By using customer self service, customers can search for solutions and submit draft solutions. You can then review these draft solutions and add them to the solution library.

See *PeopleSoft EnterpriseOne Customer Self Service 8.11 SPI PeopleBook*, “Using Service and Support Portal Applications”.

Related Objects

By using the Solutions program, you can associate solutions to items and review a list of cases and work orders to which the solution has been associated. You access this information through the Related Objects tab on the Solution Add form.

After you enter and save the basic solution information, you can associate solutions to items. When you enter a case or work order for a specific item, the solution displays on the Frequently Used form for you to review and select the appropriate solution. The solution displays on the Frequently Used form after it has solved at least one case or work order with the selected item. Until the solution has solved a case associated with the selected item, it does not appear on the Frequently Used form.

When a solution is associated with a case or work order, the system updates the solution record with the relationship information. The solution record includes all cases and work orders to which the solution has been applied, regardless of whether the solution solved the case or work order. The system maintains the list of related cases and work orders in real-time. These relationships cannot be deleted.

Solution administrators can use this information to review the quantity of cases and work orders with which the solution has been associated, as well as the details of each case or work order with which the solution has been associated. Solution administrators can also view which other solutions have also been associated with a case or work order.

See [Chapter 8, “Entering Cases,” Working with Solutions, page 126](#).

Attachments

Use the Attachments tab in the Solution program to attach additional information. Attachments are visible on solution summary forms, including self service forms. Therefore, you typically want all attachments (especially those associated with solutions having a visibility of *All*) to be files that a customer uses when applying the solution. You can access the attachment form through the Attachments tab in the Solution Add form.

Forms Used to Create Solutions

Form Name	FormID	Navigation	Usage
Search for Solutions	W90CE050C	Solution Advisor (G90CE0302), Define Solutions	Search for and review solutions.
Add Solution	W90CE050B	Click Add on the Search for Solutions form.	Create solutions.

Creating a Solution

Access the Add Solution form.

Define Solutions - Add Solution

Solution ID

Library Bike Accessories

Solution Status *

Solution Type *

Solution Visibility *

Solution Summary *

Keyword or Phrase

Symptoms

Details *

Add Solution form

Library

Select the solution's primary library. This library is considered the solution's owning library. You define libraries by using the Add Library form.

See [Chapter 7, "Setting Up Solution Advisor," Creating Solution Libraries, page 104.](#)

Status

Select the appropriate solution status from UDC 90CE/SS. When you create solutions through the Case Entry program, the system automatically assigns them a *Draft* status. Only solutions with an *Active* status are available for viewing by users other than solution administrators. When solutions are approved, the system changes their status to *Active* to make them available. Select *Inactive* when you want to expire a solution or make it no longer available.

Type

Select the appropriate type from UDC 90CE/ST. Typically, select either *Standard* or *Workaround*.

The system assigns the type *Adhoc* to solutions that are created when agents enter an independent text resolution. You can convert these standard solutions by changing the type.

The system assigns the type *Canned* to solutions that are created when self service users select predefined case or work order closure reasons.

Visibility

Select *All* if you want self service users to view the solution. Select *Internal* to prevent self-service users from using this solution.

Solution Summary	Enter a short description of the solution. You can use this field to search for solutions.
Keyword or Phrase	Enter search keywords or a phrase for a solution.
Symptoms	Enter a description of the problem that the solution addresses.
Details	Enter the full explanation of how to solve the problem.

Creating Solution Libraries

This section provides an overview of solution libraries and discusses how to create a solution library.

Understanding Solution Libraries

A solution library:

- Groups solutions under a common header.
- Organizes solution information logically.
- Creates an intuitive solution repository and a less complicated search experience.

In the Solution Library program (P90CE040), create groups with which one or many solutions are associated. Each solution can be associated with only one solution library. Only those users with solution administrator rights can access this program and create new libraries.

Forms Used to Create Solution Libraries

Form Name	FormID	Navigation	Usage
Search for Libraries	W90CE040C	Solution Advisor (G90CE0302), Define Solution Library	Search for solution libraries.
Add Library	W90CE040A	Click Add on the Search for Libraries form.	Define solution libraries.

Creating a Solution Library

Access the Add Library form.

Define Solution Library - Add Library

Save and Close
Save and Continue
Save and Add New
Cancel

Library ID

Library Name *

Library Description

Updated Date/Time

Updated By

Save and Close
Save and Continue
Save and Add New
Cancel

Add Library form

- Library Name** Enter a name for the library.
- Library Description** Enter a short description of the library.

Updating the Usage and Solved Count

This section provides an overview of the usage and solved count and discusses how to run the Frequently Used Solution Processing program (R90CE01).

Understanding the Usage and Solved Count

Each solution record stores metrics, such as a usage count and a solved count. The usage count enables an administrator to evaluate how often a solution is selected, whereas the solved count identifies how often the solution resolves the case or work order for which it was selected. Additionally, the metrics are used to generate a list of the most frequently used solutions for each case or work order, based on the inventory item that is associated with the case or work order.

Solved Count

The solved count indicates how many cases and work orders the solution has resolved. This number is informational only; Solution Advisor displays this number to help you determine a solution's potential. This number increases by one every time that you set a solution status to *Successful Resolution*. The number decreases by one if you change the status of a solution that was formerly designated as successful. You must run the Frequently Used Solution Processing program (R90CE01) for the system to update the solved count.

Usage Count

The usage count indicates with how many cases and work orders the solution has been associated, regardless of whether the solution was successful.

This number is a minor factor in determining the relevance score when you use Solution Advisor to search for solutions. This number increases by one every time that you associate the solution with a case.

Running the Frequently Used Solution Processing Program (R90CE01)

To access the Frequently Used Solution Processing program (R90CE01), enter *BV* in the Fast Path field, and then enter *R90CE01* in the Batch Application field on the Work With Batch Versions form. Because only solution administrators run this program, it is not available on the Solution Advisor (G90CE0302) menu.

CHAPTER 8

Entering Cases

This chapter provides an overview of cases and discusses how to:

- Enter basic case information.
- (Rapid Start CAN and USA) Enter basic case information.
- Enter billing information for a case.
- Work with solutions.
- Enter activities for a case.
- Enter and review related actions.
- Enter comments (attachments).
- Create tasks.
- Use the case history form.
- Use related links.

Understanding Cases

As the main component of PeopleSoft EnterpriseOne Support, the Case Management system captures the details of customers' problems and provides a process to track cases from creation to resolution.

Use the Case - Manage form to enter and review all information related to a case. This form provides tabs and access to the Case Entry program (P90CG501), the Solution program (P90CG502), the Activities program (P90CG510), and the Related Actions program (P90CG503). You can also attach both internal and external messages or documents to the case using media objects.

You can create various objects related to a case, such as sales orders, quotes, scripts, service work orders, equipment work orders, leads, and returned material authorizations (RMAs), all within the context of a case using the Related Actions program.

Click the Related Links link to access each area of a case that you want to review. You can access multiple contact, customer, supplier, employee, item, equipment, and contracts programs using this link.

Use the Activities program to assign issues related to the case to other team members in order to resolve a customer problem. Activities, a foundational component of PeopleSoft EnterpriseOne Customer Relationship Management (CRM), enable users to track case-related actions such as meetings, tasks, and to-dos. Activities appear on the calendar control.

Entering Basic Case Information

This section provides an overview of basic case information, lists a prerequisite, and discusses how to enter basic case information.

Understanding Basic Case Information

Before you can process a case and enter additional information (such as activities, billing, and solutions), you must enter basic data in the system—for example, a customer or item number—so the system can assign a case number and begin processing the case.

Prerequisite

Before you can enter a case, you must:

- Complete the steps described in the chapter named “Setting Up Case Management Fundamentals.”
- Exist in the Address Book and be defined as a service provider.
- Complete the steps described in the chapter named “Setting Up Provider Groups.”

See [Chapter 3, “Setting Up Case Management Fundamentals,” page 15.](#)

See [Chapter 4, “Setting Up Provider Groups,” page 41.](#)

and

See *PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook*, “Setting Up Service Management,” Setting Up Customers and Service Providers.

Forms Used to Enter Basic Case Information

Form Name	FormID	Navigation	Usage
Work With Case Management	W17500A	Daily Support Processing (G90CE01), Case Entry	Search for cases.
Add Case	W90CG504A	Click the Add button on the Work With Case Management form.	Enter basic case information.


Entering Basic Case Information

Access the Add Case form.


Case Entry - Add Case













Save and Close **Save and Continue** **Save and Add New** **Cancel** Case Number

Customer

Customer Number	<input type="text" value="3334"/>	<i>Lewis Enterprises</i>	Quick Add 
Caller Number	<input type="text" value="3334"/>		Call Backs <input type="text" value="2"/>
Caller Name	<input type="text" value="MARY JOHNSON"/>	E-Mail Address	<input type="text"/>
Phone Number	<input type="text" value="303"/> <input type="text" value="555-1212"/>		

Issue Description

Text1 

Courier New | 10 | **B** |  | **U** |  |  |  |  |  |  |  |  |  |  | 

Problem Reason *Product Req...*

Add Case form (1 of 2)

Detail	Dates/Times	Additional Information	Category Codes
Beginning Date/Time	<input type="text" value="10/19/04"/>	<input type="text" value="11:58:00"/>	Ending Date/Time <input type="text"/> <input type="text"/>
Case Severity			
Priority	<input type="text" value="2"/>	Priority	Case Status <input type="text"/>
Case Type	<input type="text" value="6"/>	Web	
Product Information			
Equipment Number	<input type="text"/>		
Inventory Item Number	<input type="text" value="2003"/>	Cro-Moly Frame, Green	
Branch Plant/Lot Number	<input type="text"/>		<input type="text"/>
Product Model/Family	<input type="text"/>		<input type="text"/>
Product Component	<input type="text"/>	Environment	<input type="text"/>
Provider Group			
Provider Group Number	<input type="text" value="60001"/>	Computerized Branch Exch. Prov	ACD Number <input type="text"/>
Assignee	<input type="text" value="5651"/>	Rothchild, Abigail E.	
Contract Information			
Contract Number	<input type="text"/>	<input type="text"/>	<input type="text"/> Entitlement Check
Entitlement Check	<input type="text" value="0"/>	Not Entitled	Service Package <input type="text"/>
Coverage Group	<input type="text"/>		

Add Case form: Detail tab (2 of 2)

Customer

Customer Number

Enter the customer number.

If the customer exists in the system, the system retrieves information about that customer, such as a telephone number. This information appears by default. You can override default values, if necessary.

If the customer does not exist in the Address Book, click the Quick Add link and add the customer record.

See *PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook*, "Setting Up Service Management," Setting Up Customers for Service Management.

Call Backs

Enter a value from UDC 17/CB to specify the number of callbacks for the case.

Caller Number

Enter the caller number to associate a third-party with the case, such as a technician or a customer service representative. The customer number appears by default in this field.

Caller Name

Enter the customer contact name for the case.

If the caller does not exist in the Address Book, click the ellipsis (...) link and add the contact information.

Problem	<p>Enter a short description for the case.</p> <p>Depending on how you have set the processing options, you can use the first 80 characters from the media object as the default value for this field. If you are not using Solution Advisor and the Solution system constant is not selected, you can also click the Search button to select a failure description</p> <p>See Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Case Management Constants, page 16.</p>
Reason	<p>Enter the reason for the customer issue.</p> <hr/> <p>Note. To attach additional text to the case, enter additional text in the text box on the form. When you define status rules, you can define when the text attached to a case is protected. When you protect text, you prevent changes to the text attached to a case. You can add to text that is protected; click the Append Text link. You cannot modify the existing text. The system appends a time stamp to the text area when the information changes.</p> <hr/>
Priority	Enter a value from UDC 17/PR to specify the case priority code. In conjunction with the F1753 table, this field determines the response time.
Case Status	Enter a value from UDC 17/ST to specify the case status, such as Open, Active, and so forth.
Case Type	Enter a value from UDC 17/CT to specify the case type.
Equipment Number	<p>Enter an identification code that represents an asset. You might enter a serial number in this field based on the equipment constants. Enter the identification code in one of these formats:</p> <p>Asset number: A computer-assigned, eight-digit numeric control number.</p> <p>Unit number: A 12-character alphanumeric field.</p> <p>Serial number: A 25-character alphanumeric field.</p> <p>Every asset has an asset number. You can use unit number and serial number to further identify assets. If this is a data entry field, the first character you enter indicates whether you are entering the primary format that is defined for the system, or one of the other two formats. A special character, such as a forward slash (/) or asterisk (*), in the first position of this field indicates the asset number format that you are using. You assign special characters to asset number formats on the Fixed Asset System Constants form.</p>
Inventory Item Number	Enter a number that the system assigns to an item. It can be in short, long, or third item number format.
Product Model/Family	<p>Enter a code that classifies an inventory item into a model for customer service.</p> <hr/> <p>Note. Based on the equipment number that you set up in the equipment record, the system retrieves the inventory item number, branch/plant log, and product model/family. If you do not enter the equipment number, the system retrieves the branch/plant lot and the product model/family, based on the inventory item number.</p> <hr/>
Product Component	Enter the components that make an equipment number or components associated with a customer site.

Environment	Enter the operating environment of the user.
Provider Group Number	<p>Enter the provider group number. If you set up routing rules, the system automatically assigns the case to a particular provider group, based on the case type or generically. The provider group is assigned based on the routing rules. If the provider group is manually entered or appears by default from the processing options; it is not assigned based on the routing information.</p> <p>If you enter a value other than the Address Book number—such as the long address or tax ID—you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.</p> <p>For example, if the Address Book number 4100 (total solutions) has a long address TOTAL and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type *TOTAL into the field. The system would return 4100.</p> <p>See Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Case Management Constants, page 16.</p>
Assignee	<p>Enter the assignee manually; or assign by the routing information or the escalation routine if you are using escalation by skill level.</p> <p>If you are manually assigning cases, enter the Address Book number for the assignee.</p> <p>If you enter a value other than the Address Book number—such as the long address or tax ID—you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.</p> <p>If you are escalating using skill levels and an assignee has been entered or appears by default from routing rules and the assignee is not an employee for the provider group, the case is reassigned to a provider group member in the escalation process.</p> <p>If you set up routing rules that specify the case to be directed to an assignee, this field contains the default information.</p> <p>See Chapter 9, “Working with Escalations,” page 139.</p> <p>and</p> <p>See Chapter 4, “Setting Up Provider Groups,” Setting Up Routing Information, page 50.</p>
Service Package	Displays the service package by default if the case is entitled. A service package contains the service type, coverage type, response time, and coverage group.
Coverage Group	<p>Displays default information for the service package. The coverage group consists of unlimited cost codes and the percentage covered for each cost code.</p> <p>See <i>PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook</i>, “Managing Contracts,” Entering Contract Coverage Information.</p>

Dates/Times

Access the Dates/Times form. Select the Dates/Times tab.

Detail	Dates/Times	Additional Information	Category Codes
Date/Time Begin	10/19/04	11:58:00	
Date/Time End			
Date/Time Returned	10/19/04	11:58:00	Response Time 0.00
Date/Time On Site			Commit Duration 00:00:00
Date/Time Committed			
User's Time Zone	42	Mountain Time (US & Canada)	

Add Case form: Dates/Times tab

Date/Time Returned

Enter the date that the job is executed. When a case is first assigned, the system supplies the current date and time in this field and the Date/Time Begin field.

Date/Time On Site

Enter the date that the service provider arrives at the customer site.

Date/Time Committed

Displays the system-calculated commitment date and time.

If the case is covered under a contract, this field uses the current date and time plus the response time guaranteed in the contract.

If the case is not covered under a contract, this field displays the current date and time plus a guaranteed response time that is based on the provider group and case type. This value is multiplied by the commitment percentage, which is based on the provider group and priority.

See [Chapter 4, "Setting Up Provider Groups," Setting Up Case Priorities Using Notification Escalation Method, page 54.](#)

and

See [Chapter 4, "Setting Up Provider Groups," Setting Up Priorities Using Skill-Level Escalation Method, page 57.](#)

Users Time Zone Displays the time zone defined in the service provider information listed in the Address Book record for the user entering the case.

Commitment Duration Displays the amount of time that has elapsed between case entry and case assignment.

Additional Information

Access the Additional Information form. Select the Additional Information tab.

Add Case form: Additional Information tab

Parent Case Number Enter the parent case number if the case is a child of another case or if cases are related.

Claim Number Enter a claim number to link a claim that product end user submits. Claim numbers are found often on preprinted forms.

Case Source Enter a value from UDC 17/SC to specify the source of a case, such as telephone, email, or web.

Tickler Date Enter the date on which the transaction takes effect. The effective date is used generically. It can be the date of the next raise, a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, or any other date that is appropriate.

When you enter tickler dates, the system creates a message in the mailbox of the provider group or assignee with the tickler date. For example, you can use the tickler fields if you want to call a customer after closing the case to ensure that the issue does not require further attention.

Tickler Description Enter a user-defined name or remark.

Responsible Business Unit Enter the entity for where you want to track costs; for example, a warehouse location, job, project, work center, or branch/plant

You can assign a business unit to a voucher, invoice, fixed asset, and so forth, for responsibility reporting. The system provides reports of open accounts

payable and accounts receivable by business unit, for example, to track equipment by responsible department.

Business unit security can prevent you from running inquiries on business units for which you have no authority.

Covered

Enter a value from UDC 41/9 to identify the general ledger offset to use when the system is searching for the account to which it posts the covered portion (by warranty or contract) of the accounting transaction. If you do not want to specify a general ledger offset, you can enter four asterisks (****) in this field or you can leave the field blank. If you leave the field blank, the system uses the general ledger offset from the Inventory system.

Non-Covered

Enter a value from UDC 41/9 to identify the general ledger offset to use when the system is searching for the account to which it posts the non-covered portion of the accounting transaction. If you do not want to specify a general ledger offset, you can enter four asterisks (****) in this field or you can leave the field blank. If you leave the field blank, the system uses the general ledger offset from the Inventory system.

Partner

Enter the partner number. A partner can be a third-party that you attach to a case. For example, a partner might be a company that you use to resolve a case.

See *PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications 8.11 SPI PeopleBook*, “Managing Partners”.

Category Codes

Access the Category Codes form. Select the Category Codes tab.

Case Category Codes and Equipment Category Codes Review and enter category codes for cases or equipment. Complete the category code fields, as necessary.

(Rapid Start CAN and USA) Entering Basic Case Information

This section lists a prerequisite and discusses:

- How to enter basic case information.
- Preconfigured processing options for Canada and the United States Work With Calls (P17500).
- Preconfigured processing options for Canada and the United States Case Add & Update (P90CG002).
- Preconfigured processing options for Canada and the United States Case Update (P90CG501).
- Preconfigured processing options for Canada and the United States Case Add (P90CG504).

Prerequisite

The user signing on needs to be set up in the User Profile. The address book number used in the User Profile needs to be added to the address book. The address book needs to be set up as a Service Provider. If this isn't done the user will not be able to enter a Case.

1. Navigate to menu GH9011 and select User Profiles.

The user needs to be set up here. Make note of the address number assigned to the user.

- Navigate to Address Book (P01012) and Find on the address number.

If the address number is not found, add it. If the address number is found, take the SWM Information Row exit and add service provider information.

Entering Basic Case Information

This table lists the tasks for entering basic case information.

Task	Navigation	Program and Version	Preconfigured Data
Enter a case.	Customer Relationship Management Case Entry	P17500/RIS0001 P90CG504/RIS0001 P90CG002/RIS0001	The processing options for P17500 specify version RIS0001 of P90CG504, which is used to add cases. Version RIS0001 of P90CB504 has processing options set to call version RIS0001 of P90CB002, which is the master business function for adding and updating cases.
Review, revise, and manage cases.	Customer Relationship Management Case Entry	P17500/RIS0001 P90CG501/RIS0001 P90CG002/RIS0001	The processing options for P17500 specify version RIS0001 of P90CG501, which is used to update case information. Version RIS0001 of P90CB501 has processing options set to call version RIS0001 of P90CB002, which is the master business function for adding and updating cases.

Data reports provide additional information about data that has been preconfigured for Rapid Start.

See *PeopleSoft EnterpriseOne Rapid Start Fundamentals 8.11 SPI PeopleBook*, “(CAN and USA) Rapid Start Data Reports”.

Preconfigured Processing Options for Canada and the United States Work With Calls (P17500)

These processing options show the values that are preconfigured for version RIS0001.

Display

Processing Option Description	Value or Status
1. Time Zone Filter	blank
2. Starting Call Back Time	60

Processing Option Description	Value or Status
3. Country Code	blank
4. Language	blank
5. From status	blank
6. To status	blank
7. Number of days to use for date filter	0
8. Priority column	1
9. CTI Interface	blank
10. In Use cases	blank

Defaults

Processing Option Description	Value or Status
1. Country Code	blank
2. Language	blank
3. Assignee	blank
4. Provider Group	0
5 Document Type	blank
6. Case Reason	blank
7. Responsible Business Unit	blank

Versions

Processing Option Description	Value or Status
1. Case Update (P90CG501) Version	RIS0001
2. Case Add (P90CG504) Version	RIS0001
3. Supplemental Data (P00092) Version	blank
4. Work With Tasks (P17504) Version	blank
5. Work Center (P012501) Version	blank
6. Print Case (R17674) Version	blank

Processing Option Description	Value or Status
7. Work with Failure Analysis (P17766) Version	blank
8. Failure Analysis (P17767) Version	blank

Process

Processing Option Description	Value or Status
1. Deleting Records	blank

See Also

Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Processing Options for the Work With Case Program (P17500), page 29

Preconfigured Processing Options for Canada and the United States Case Add & Update (P90CG002)

These processing options show the values that are preconfigured for version RIS0001.

Defaults

Processing Option Description	Value or Status
1. Document Type	blank
2. Problem	1
3. Caller Name Blank - Do not default Caller Name from Customer Name	1
4. Assignee	blank
5. Reporting Codes	blank
6. Phone Number Type for the fax number	blank
7. Status for Case is assigned	blank
8. Provider Group Note: This Provider Group will override the Provider Group from the routing rules.	60000
9. Case Type	blank
10. Cost Type	blank
11. Pricing Units	0
12. Pricing Unit of Measure	blank

Processing Option Description	Value or Status
13. Call Reason	blank
14. Responsible Business Unit	blank

Display

Processing Option Description	Value or Status
THESE PROCESSING OPTIONS DO NOT APPLY TO CASE APPLICATION (P17501E).	blank
1. Routing Information	blank
2. Equipment Information	blank
3. Who's Who Search/Select	blank

Versions

Processing Option Description	Value or Status
THESE PROCESSING OPTIONS DO NOT APPLY TO CASE APPLICATION (P17501E).	blank
Enter the version for the following programs.	blank
1. Work With Previous Customer Case (P17500) Version	blank
2. Work With Previous Product Case (P17500) Version	blank
3. Case History (P17500) Version	blank
4. Work With Tasks (P17504) Version	blank
5. Time Entry (P17505) Version	blank
6. Quick Customer/Contact Add (P01015) Version	blank
7. Address Book Revisions (P90CA080) Version	blank
8. Customer Master (P90CA080) Version	blank
9. Customer Ledger Inquiry (P03B2022) Version	blank
10. Vendor Master (P04012) Version	blank
11. A/P Standard Voucher Entry (P0411) Version	blank
12. Payment Inquiry (P0413M) Version	blank
13. Eligibility (P08334) Version	blank
14. Employee DBA Instructions (P050181) Version	blank

Processing Option Description	Value or Status
15. Employee Profile (P060116) Version	blank
16. Work With Employee (P0801) Version	blank
17. Sales Order Entry (P42101) Version	blank
18. Supply and Demand Inquiry (P4021) Version	blank
19. Inquiry by Equipment (P48201) Version	blank
20. Work Order Revisions (P17714) Version	blank
21. Supplemental Data - Customer (P00092) Version	blank
22. Supplemental Data - Item (P00092) Version	blank
23. Supplemental Data - Work Order (P00092) Version	blank
24. Supplemental Data - Sales Order (P00092) Version	blank
25. Equipment Master Inquiry (P1701) Version	blank
26. Equipment Master Revisions (P90CD0001) Version	RIS0001
27. Contracts (P1720) Version	blank
28. Print Case (R17674) Version	blank
29. Case Workfile Generation (R17675) Version	blank
30. Service Billing Inquiry (P4812) Version	blank
31. Failure Analysis Tree Search and Select (P17763S) Version	blank
32. Work with Failure Analysis (P17766) Version	blank
33. Failure Analysis (P17767) Version	blank
34. Failure Analysis Search and Select (P17768) Version	blank
35. Related Actions (P90CG503) Version	RIS0001
36. Solution Advisor (P90CG502) Version	blank
37. Case Version (P90CG501) for Send Message Link	RIS0001

Edits

Processing Option Description	Value or Status
Entitlement	blank

Processing Option Description	Value or Status
1. Entitlement Check	2
Reopening Case	blank
2. Maximum days for reopening Case	0
3. Date/Time Opened	blank
4. Date/Time Returned	blank
General	blank
5. Area Code and Phone Number	blank
6. Reason Code	blank

Process

Processing Option Description	Value or Status
1. Copy the text	blank
2. Date/Time stamp	blank
3. Protect the Provider Group	blank
4. Protect Pricing Method	0
5. Customer inconsistent with Equipment Master	blank
6. Site inconsistent with Equipment Master	blank
7. Validate assignee in Provider Group	blank
8. Check required fields	blank
9. Bill for Cases	blank
10. Next Number Processing	blank

Vertex

Processing Option Description	Value or Status
This processing option only pertains if Vertex's Quantum Sales and Use Tax Software (third-party tax software) has been implemented.	blank
1. Transaction Type for Flat Rate Billings	blank

Preconfigured Processing Options for Canada and the United States Case Update (P90CG501)

These processing options show the values that are preconfigured for version RIS0001.

Version

Processing Option Description	Value or Status
1. Case Master Business Function (P90CG002) Version.	RIS0001

See Also

[Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Processing Options for Case Management, page 19](#)

Preconfigured Processing Options for Canada and the United States Case Add (P90CG504)

These processing options show the values that are preconfigured for version RIS0001.

Versions

Processing Option Description	Value or Status
1. Case Master Business Function (P90CG002) for Case Add.	RIS0001
2. Case Update (P90CG501) Version.	RIS0001

Entering Billing Information for a Case

This section lists a prerequisite and discusses how to enter billing information.

Prerequisite

Before you complete the tasks in this section, you must complete the tasks required for setting up billing for cases.

See [Chapter 5, “Understanding Case Management Billing,” page 61](#).

Form Used to Enter Billing Information for a Case

Form Name	FormID	Navigation	Usage
Billing Information	W90CG501B	<p>Daily Support Processing (G90CE01), Case Entry</p> <p>Select the customer on the Work With Case Management form, and click Select</p> <p>From Case Entry, click the Billing link.</p>	Enter billing information for a case.

Entering Billing Information

Access the Billing Information form.

Note. If you are running an inquiry on a case that you have already billed, some of the fields in this task might be disabled.

The system displays the Billing Information form only if you activated the Bill for Cases processing option on the Process tab for the Case Update program (P90CG501).

Customer Info

Bill To Number and Send Invoice To Number

Enter the Address Book number for the bill-to address or the send-to invoice address. If you enter a value other than the Address Book number—such as the long address or tax ID—you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the Address Book number in this field.

For example, if the Address Book number 4100 (total solutions) has a long address TOTAL and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type *TOTAL into the field, and the system would return 4100.

PO Number

Enter an alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.

Payment Terms

Specify the terms of payment, including the percentage of discount available if the invoice is paid by the discount due date. Use a blank code to indicate the most frequently-used payment term. You define each type of payment term on the Payment Terms Revisions form. Examples of payment terms include:

Blank: Net 15.

001: 1/10 net 30.

002: 2/10 net 30.

003: Due on the 10th day of every month.

006: Due upon receipt.

This code prints on customer invoices.

Payment Instrument Enter a value from UDC 00/PY to specify how payments are made by the customer. For example:

C: Check

D: Draft

T: Electronic funds transfer

Responsible Business Unit Enter the entity within the business for which you want to track costs; for example, a warehouse location, job, project, work center, or branch/plant. This field is alphanumeric.

You can assign a business unit to a voucher, invoice, fixed asset, and so forth, for responsibility reporting. The system provides reports of open accounts payable and accounts receivable by business unit, for example, to track equipment by responsible department.

Business unit security can prevent you from running inquiries on business units for which you have no authority.

Pricing Info

Select the Pricing Info (pricing information) tab.

Flat Rate and Time And Material Enter a value that specifies whether a type of service is priced based on a flat rate or based on actual time and materials. Values are:

Blank: A blank value is only valid when defining the method of pricing for a service provider. It is used to indicate that the service provider is an internal service provider and is not paid.

F: Charges for labor are based on a flat rate. Charges for parts are already included in the flat rate.

T: Charges for labor are based on actual labor hours. Charges for parts are based on actual parts used.

Cost Type Designate each element of cost for an item. Examples of the cost object types are:

AI: Purchased raw material.

BI: Direct labor routing roll-up.

B2: Setup labor routing roll-up.

CI: Variable burden routing roll-up.

C2: Fixed burden routing roll-up.

Dx: Outside operation routing roll-up.

Xx: Extra add-ons, such as electricity and water.

The optional add-on computations usually operate with the type *Xx* (extra add-ons). This cost structure can use an unlimited number of cost components to calculate alternative cost roll-ups. The system then associates these cost components with one of six user-defined summary cost buckets.

Adjustment Schedule Enter a value from UDC 40/AS to identify the price and adjustment schedule. A price and adjustment schedule contains adjustment types for which a customer or an item might be eligible. The system applies the adjustments in

the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through customer billing instructions. When you enter a case, the system copies the schedule attached to the sold-to address into the order. You can override this schedule at the header level.

Price Effective Date	Enter the price effective date. The system uses the Price Effective Date field to determine the base price and all advanced pricing adjustments. The value loaded in this field is stored in the F4009 table.
Pricing Units	Enter the amount billed for a case. Depending on the type of charge calculated (the bill item rate basis), the value in this field multiplied by the billing rate produces the gross charge amount.
Pricing Unit of Measure	Enter a value from UDC 00/UM to specify the unit of measure for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so forth.
Taxable	Select this check box if the case is taxable. The system enters default values in the Tax Explanation Code field and the Tax Rate/Area field.

Billing Amounts

Select the Billing Amounts tab.

Currency	Identify the transaction currency.
Exchange Rate	Enter the number that a foreign currency amount is multiplied by or divided by to calculate a domestic currency amount. The number in this field can have a maximum of seven decimal positions. If more are entered, the system adjusts to the nearest seven decimal positions.
Foreign	Displays amounts in the domestic or foreign currency. Select this field to have the system display amounts in the foreign currency. Clear this field to have the system display amounts in the domestic currency.
Minimum Amount	Enter the minimum monetary amount to charge the customer. If the billable amount is less than the minimum amount, the system charges the customer for the minimum amount instead of the billable amount. This monetary amount is expressed in the currency of the company.
Flat Rate Amount	Enter the monetary amount charged to the customer regardless of how many hours are spent or how many parts are used in performing the service. The monetary amount is expressed in the currency that is set up for the company initiating the transaction. The system retrieves the flat rate amount from the Advanced Pricing application. You can override this amount. If you override the amount and later need to retrieve the original default price from the Advanced Pricing application, select Reprice Flat Rate from the Form menu. Review the billable amount. If you entered a minimum amount and a flat rate amount, the system uses the greater of the two values as the billable amount.
Discount Percent	Select this check box to indicate that this case is subject to a discount. If you use the discount percentage, the system calculates the discount based on a percentage of the billable amount.

Discount Amount	Enter the amount of the discount available, as opposed to the amount of the discount actually taken. The discount calculated is based on the invoice amount rather than the revenue amount.
Total Taxable Amount, Tax, and Total Billable Amount	Review the amounts in these fields. The system calculates the tax amount by using the tax rate area and the tax explanation code from the Pricing Info tab. The total billable amount is the sum of the Total Taxable Amount and the Tax fields.
Billable	Select this check box.

Note. The Billable check box must be selected to generate an entry successfully when you run the Case Workfile Generation program (R17675).

Working with Solutions

This section provides an overview of solutions, lists a prerequisite and common elements used in this section, and discusses how to:

- Assign solutions to a case.
- Send solutions.
- Review frequently used solutions.
- Search for solutions to a case.

Note. Solution Advisor is an additional application that can be used with cases.

Understanding Solutions

When you enter or review a case, you can access and assign solutions by using the Solutions tab in the Case Revisions program. The Solutions application enables you to:

- Review the attempted solutions.
- Review the frequently-used solutions.
- Search for solutions.
- Send solutions to a customer through email.
- Create a new solution that can be added to the solution repository.

Resolution Statuses

When you assign a solution to a case, it can have one of these statuses:

- *IC* (in consideration): You have not suggested this solution. The solution appears in the list of attempted solutions and is available when you're ready to try it.
- *FR* (failed resolution): The caller or technician attempted the solution, but the solution did not solve the problem.
- *SR* (successful resolution): The solution solved the problem. You can associate this status with only one solution listed in the Attempted Solutions grid for the selected case.
- *WC* (waiting on customer): You have suggested this solution, but you don't know whether the solution worked.

- *WD* (withdrawn): The solution should not be associated with the case and is not presented to the caller.

Resolution Process

You use Solution Advisor to search for resolutions to cases. You can search for solutions, cases, work orders, and scripts to find possible case resolutions. You access the basic and advanced search fields from the Solution tab on the Manage Case form. When you search for cases, solutions, work orders and scripts, the Solution Advisor returns results that match the search criteria. The system displays the relevancy value of each search result. Typically, search results with the highest relevancy provide the most valuable information, as they most closely match the search criteria that you enter. You can perform these searches with Solution Advisor:

- Case sensitive searches.

To ensure that the system returns results that include the text and case that you enter in the search criteria, you can select the Case Sensitive option when performing a search.

- Similar word searches.

To view results that include words that are similar to the search criteria, you can select the Include Similar Words option when performing a search.

- Wildcard searches.

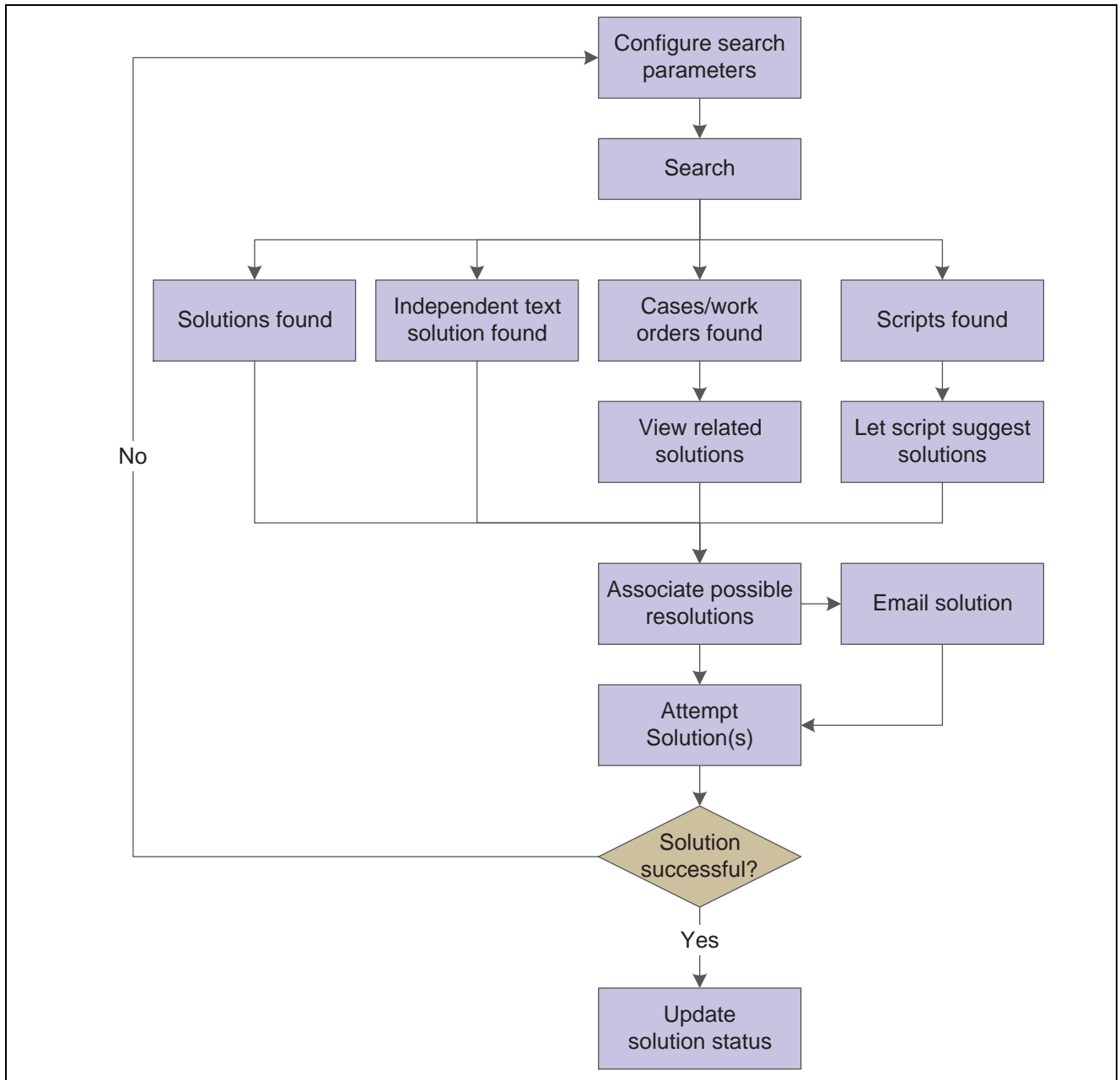
You can use asterisks (*) as wildcards when searching for solutions. For example, to search for cases that are related to items R500, R500A and R5001, you can enter R500* in the search criteria.

- Media object text searches.

You can search the text in the notes that are attached to cases and solutions. Notes are attached to cases and solutions as media objects.

Note. Resolutions do not change the status of the case. After you assign a successful solution for a case, the case status is updated to *999* (complete or closed). You must reopen the case by updating the Case Status field on the Case Update form before you can change the solution status.

This graphic illustrates the solution search and resolution process for cases:



Solution search process to resolve cases

Prerequisites

Before you can search for and assign solutions to cases, a solution administrator needs to:

- Set up Solution Advisor.
- Define solution libraries.
- Define solutions.
- Specify in the S/WM (Service and Warranty Management) System Constants (P17001) for cases to use Solution Advisor.

See Also

[Chapter 7, “Setting Up Solution Advisor,” page 99](#)

Common Elements Used in This Section

Display	Select the number of records that are displayed. The system searches only until it reaches that amount. For example, if you select 25 rows, the system searches until it finds the first 25 records that match the search criteria determined in the Search Solution fields. Click Search to display the results. When a user searches more than one search object (for example, cases and solutions) the selected number of display records for each object are added together to define the upper limit of the search result set.
ID	Click the ID link to review or execute a record included in the search result set. For example, if solutions appear on the Frequently Used form, you can click the ID link to view the details of the Solution record. On the Advanced Search form, you can click the ID of a result set record to view the details of solutions, work orders, and cases. If you search for scripts, you can execute a script by clicking the script ID.
Select	Select a solution from the Attempted Solutions form to send the solution to the customer through email. You can select up to five solution records at a time. When you assign solutions to the case from the Frequently Used, and Search forms, those solutions appear in the Attempted Solutions grid on the Attempted Solutions form.
Solution ID	Enter the unique identification number assigned to the solution in the Solutions program. On the Attempted Solutions form, you must enter a solution ID and then click the Assign Solution button to assign the solution to the case.
Solution Summary	Enter solution summary information in this field to search for possible solutions. You define this field when you set up solutions to enable searches.

Form Used to Work with Solutions

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Search for and select the case.	Review case information.

Assigning Solutions to a Case

Access the Manage Case form. Select the Solutions tab.

Case Entry - Manage Solutions

CONTACT: LEWIS ENTERPRISES 303 555-4100 CASE: 34
 PROBLEM: TIRE REPLACEMENT STATUS: Complete

Case Solution Activities Related Actions Attachments

Attempted Solutions

Close

Attempted Solutions

Resolution

Resolution Status: SR Successful Resolution Resolution Failed

Resolution Summary: How to change a flat tire

Resolution Detail: In order to fix a flat tire, you must purchase a tube repair kit. Follow the instructions in the kit, and using the tools provided you will be back on your way in not time at all.

Manage Solutions for Case <number> form (1 of 2)

Assign Solution

Solution ID:

Records 1 - 1

Select	Solution ID	Solution Summary	Status	Status Description	Date Mod
<input type="checkbox"/>	5	How to change a flat tire	SR	Successful Resolution	10/1

Save Changes Undo Changes Email Selected Solution(s)

Manage Solutions for Case <number> form (2 of 2)

Use this form to view solutions that have been assigned to the cases and access the email application that enables users to send solutions to customers. You can assign solutions from the Search, Frequently Used, and Create New forms; however, you must always return to the Attempted Solutions form to view the list of solutions that you have associated with the case and to send selected solutions to the customer.

Resolution Status

Enter SR (successful resolution) in the Status field of an attempted solution record; the system populates this field. The value appears by default from the Status field of the updated solution record in the Attempted Solutions grid.

Resolution Summary	Enter <i>SR</i> (successful resolution) in the Status field of an attempted solution record; the system populates this field. The value appears by default from the Solution Summary field of the updated solution record in the Attempted Solutions grid.
Resolution Detail	Enter <i>SR</i> (successful resolution) in the Status field of an attempted solution record; the system populates this field. The value appears by default from the Details field of the updated solution record in the Attempted Solution grid.
Status	<p>Select a solution status from UDC 90CE/AS. When solutions initially appear on this list, they have a status of <i>IC</i> (in consideration).</p> <p>To specify that a solution has resolved the case, enter <i>SR</i> (successful resolution) in the Status field of the appropriate attempted solution record. When you enter <i>SR</i>, the system updates the Resolution Status, Resolution Summary, and Resolution Detail fields. After you assign a solution with a status <i>SR</i>, you cannot change the status of other solutions.</p> <p>If you determine that a solution does not resolve a case after you have assigned it a status <i>SR</i>, reopen the case, click Resolution Failed and the system returns the solution to the Records area of the form with a status <i>FR</i> (failed resolution). You can then assign another solution to the case and edit the status of other solutions, including the solution that you marked as a failed resolution.</p> <hr/> <p>Note. After you assign a successful solution for a case, the case status is updated to <i>999</i> (complete or closed). You must reopen the case by updating the Case Status field on the Case Update form before you can change the solution status.</p> <hr/>

Sending Solutions

Access the Email form by selecting up to five attempted solutions and clicking the Email Selected Solution(s) button.

You can send solutions to distribution lists or individuals that are set up in the system, or you can add external email addresses to forward solutions to additional contacts. To display the Email form, you must select solutions and click Email Select Solution(s) on the Attempted Solutions form.

When you assign solutions to the case, you must first click Save Changes to display the Email Select Solution(s) button. The email address of the contact listed on the case appears by default in the External Address grid of the Email application.

Detail

Create activity for contacts	<p>Select this field to create an activity in the Activities program for the contact.</p> <p>See Chapter 8, “Entering Cases,” Entering Activities for a Case, page 133.</p>
Body	Enter additional text or edit default text. The email message consists of this text.
Email Group Lists	Select a group. If you have set up email distribution lists, click Add Email Group to search and to select additional groups that receive the details of the selected solution records.
Person List	Select the individuals who receive the solution. If individuals are set up in the system, click Add Person to search for and select individuals.

External Email Enter additional email addresses to forward solutions to individuals not listed in the Person or Group lists. The email address for the case contact appears by default.

See *PeopleSoft EnterpriseOne Customer Relationship Management Sales Applications 8.11 SP1 PeopleBook*, “Using Email and Mail Merge”.

Reviewing Frequently Used Solutions

Access the Frequently Used form. Click the Frequently Used link on the Solutions tab.

Use this form to search for solutions associated with an item. If you complete the Inventory Item Number field on the Case Entry form, the Frequently Used form displays the list of solutions that have solved cases or work orders associated with the same item number as the current case record. The solutions listed on this form are sorted in descending order based on the total number of cases and work orders that the solution has solved.

If no results appear on this form, you cannot search for additional solutions; however, you can use the Query By Example (QBE) line to narrow the results if the item is associated with numerous solutions.

Solved Count Enter a number to search for a specific solved count. This field records how many cases and work orders the solution has solved.

Searching for Solutions to a Case

Access the Manage Case form. Click the Search link on the Solutions tab.

You can conduct basic and advanced searches. When you click the Search link, the default form, the Basic Search form, appears.

Basic Search

Search Solution Select criteria to conduct the search and then enter text to search for the solution. This field searches the Solution Summary, Solution Details, and Symptoms Description fields.

Case Sensitive Select this option if you want the system to display results whose text and case match the search criteria.

Include Similar Words Select this option if you want the system to return results that include words that are similar to the search criteria.

Relevancy Review the value in this field to determine which solution best matches the search criteria. The system displays relevancy values in whole numbers from zero to 100. Typically, the results with the highest relevancy value are most valuable.

Advanced Search

Access the Advanced Search form. Click the Advanced Search link.

Select the area of the form to activate the search fields. You can search by multiple items. For example, select Case and Solution to search using both areas. You must conduct the search in one transaction. You cannot conduct a search on solutions and then conduct a search on cases to have the system combine the results.

Each area of the form searches by using AND logic.

Item	Enter an item number in the applicable area to search for solutions, scripts, cases, or work orders associated to the item.
Library	Enter a solution library. When you set up solutions, you can add a level of organization to solutions by creating libraries to group solutions.
Record Description	Review the type of record. This field specifies whether the result is a case, work order, solution, or script. You can assign solutions to cases only; however you can access work order, case, or script records through the ID field to determine the solution. With this field, you can search for and run a script. If you run a script, the Related Actions tab records a script instance for the script.
Case Notes	Enter text in this field if you want the system to search text media objects that are attached to cases. For example, if you want to search for cases that contain the word bicycle in the attached media object, enter <i>bicycle</i> in this field.
Solution Notes	Enter text in this field if you want the system to search text media objects that are attached to solutions. For example, if you want to search for solutions that contain the word bicycle in the attached media object, enter <i>bicycle</i> in this field.

See Also

[Chapter 8, “Entering Cases,” Entering Basic Case Information, page 108](#)

[Chapter 6, “Setting Up and Managing Scripts,” page 65](#)

[Chapter 8, “Entering Cases,” Entering and Reviewing Related Actions, page 134](#)

PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook, “Managing Work Orders”

[Chapter 7, “Setting Up Solution Advisor,” page 99](#)

Entering Activities for a Case

This section provides an overview of activities and discusses how to enter activities for a case.

Understanding Case Activities

Often, an agent must assign issues to other team members in order to resolve a customer’s problem. Activities track case-related actions, such as meetings, tasks, and to-dos. Activities appear on the calendar control, enabling users to manage their daily activities. To manage cases, add activities (such as messages or calendar items) to a case through the Case Activities program, which you access on a tab off the Case Revisions form.

See Also

PeopleSoft EnterpriseOne Address Book 8.11 SP1 PeopleBook, “Using Foundation Calendar”

Forms Used to Enter Activities for a Case

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Locate and select the case on the Work With Case Management form and click Select.	Review case information.
Manage Activities	W90CG510B	Select the Activities tab on the Manage Case form. Alternatively, select Daily Support Processing (G90CE01), Activity.	Review case activities.
Add Activity	W01301B	Click Add on the Manage Activities form.	Add case activities.

Entering and Reviewing Related Actions

This section provides an overview of related actions and discusses the forms used to relate actions to a case.

Understanding Related Actions

You can attach these objects to a case:

- Equipment work order
- Sales order
- Lead
- Quote
- Script
- RMA
- Service Work order

Use the Related Actions program (P90CG503) to create and associate objects, such as sales orders, quotes, service work orders, equipment work orders, leads, scripts, and RMA to a case. You can then access the revision forms for these related actions through links on the form. These associations to the case are in the F90CG503 table, which records the case or work order number, association type, lead ID, RMA number, and script ID.

Relating a Script to a Case

If the organization uses scripting, you use the Script Runtime program (P90CF180) to guide you through a case solution. A script is a predefined set of questions or statements that are joined in a specific order and used to gather information from respondents. You can use branch scripts or linear scripts to find a solution to an active case.

If you use branch scripts, the system displays different questions based on the answers provided by the respondent. Linear scripts present the same questions and responses to each respondent, regardless of the answers to previous questions. Scripts enable you to find the proper solution for a case.

You can access scripts by using either the Related Actions tab or the Solutions tab.

See Also

[Chapter 8, “Entering Cases,” Working with Solutions, page 126](#)

[Chapter 6, “Setting Up and Managing Scripts,” page 65](#)

Forms Used to Relate Actions to a Case

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Locate and select the case on the Work With Case form and click Select.	Review case information.
CRM Case Related Actions	W90CG503B	Click the Related Actions link on the Manage Case form.	Enter related actions, such as equipment work orders, service work orders, sales orders, leads, quotes, RMAs, and scripts.

See Also

[Chapter 6, “Setting Up and Managing Scripts,” page 65](#)

[Chapter 8, “Entering Cases,” Working with Solutions, page 126](#)

PeopleSoft EnterpriseOne Sales Order Management 8.11 SP1 PeopleBook, “Entering Sales Orders”

PeopleSoft EnterpriseOne Sales Order Management 8.11 SP1 PeopleBook, “Setting Up Returned Material Authorization”

PeopleSoft EnterpriseOne Service Management 8.11 SP1 PeopleBook, “Managing Work Orders”

PeopleSoft EnterpriseOne Capital Asset Management 8.11 SP1 PeopleBook, “Processing Work Orders”

Entering Comments (Attachments)

This section provides an overview of comments and lists the forms used to enter comments.

Understanding Comments

Use the Attachments form to enter case comments. On this form, you can specify whether comments are external comments (which are visible to both the customer and the organization) or internal comments (which are visible only within the organization). You can then define customer reports that include only external comments.

Form Used to Enter Comments

Form Name	FormID	Navigation	Usage
Case External Attachment	W90CG509A	Daily Support Processing (G90CE01), Case Entry Locate and select the case on the Work With Case form and click Select. Click the Attachments link on the Manage Case form.	Enter internal and external comments for the case by using the Attachments tab.

Creating Tasks

This section provides an overview of tasks and discusses how to create a task.

Understanding Tasks

A task is an action that is related to a case. You can add multiple tasks to the same case. You can also add an attachment to a task to enter detailed information. When you complete a task, you need to close it. The task and the case are separate; you can close one without closing the other. For example, you can complete a task but keep the case open.

You cannot assign the same case to multiple users. However, you can assign the associated tasks to multiple people and assign case ownership to one person. You can assign tasks as needed to other users who assist in resolving the case.

Forms Used to Create Tasks

Form Name	FormID	Navigation	Usage
Work With Tasks	W17504A	Daily Support Processing (G90CE01), Case Entry Locate and select the case on the Work With Case form and select Work With Tasks from the Row menu or select the folder button.	Work with case tasks.
Task Revisions	W17504B	Click Add from the Task Revisions form.	Set up and assign tasks to associate with the case. Note. You can also attach a task to a case; on the Manage Case form, click the Related Links link.

Creating a Task

Access the Task Revisions form.

Task Revisions form

- Case Number** Enter the case number. The Problem, Customer, and Call From field values appear by default from the case.
- Description** Enter a value from UDC 17/TN to specify the task.
- Provider Group** Enter the provider group number to assign the task to a provider group.
- Assignee** Enter the Address Book number to assign the task to an assignee.
- If you click the visual assist, the Distribution List form appears, and you can select a distribution list; you cannot search for individual Address Book records.

Using the Case History Form

This section provides an overview of case history and lists the forms used to access case history.

Understanding Case History

Access the Case History form to review case information changes such as caller, assignee, provider group, and so forth. From the Work With Case History Form menu, you can access failure analysis information associated with the case, work center, and CTI.

Forms Used to Access Case History

Form Name	FormID	Navigation	Usage
Work With Case History	W17500A	Daily Support Processing (G90CE01), Case Entry Search for and select a case.	Review case information. Click the History link to review case history.
Work Center	W012503F	Select Work Center from the Form menu on the Work With Case History form.	Review work center information.
Work With Failure Analysis	W17766C	Select Failure Analysis from the Form menu on the Work With Case History form.	Review failure analysis information. <i>See PeopleSoft EnterpriseOne Capital Asset Management 8.11 SPI PeopleBook, "Working with Failure Analysis".</i>
CTI Interface	W00094B	Select CTI from the Form menu on the Work With Case History form.	Review CTI information. <i>See Chapter 10, "Working with Computer Telephony Integration (CTI)," page 145.</i>

Using Related Links

This section provides an overview of related links and lists the forms used to access related links.

Understanding Related Links

By clicking the Related Links link on the Case Entry program, you can specify each part of a case that you want to review. You can access multiple contact, customer, supplier, employee, item, equipment, and contracts programs by clicking this link.

Form Used to Access Related Links

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Search for and select the case.	Review case information. Click the Related Links link and then select the application that you want to access.

CHAPTER 9

Working with Escalations

This chapter discusses how to:

- Escalate (promote) cases.
- Manage case escalations using skill-level escalation processing.

Escalating (Promoting) Cases

This section provides overviews of escalation using notification method and escalation using skill-level method, and lists a prerequisite.

You determine the escalation method by using the Case tab in the S/WM System Constants program (P17001).

See [Chapter 3, “Setting Up Case Management Fundamentals,” page 15](#).

Understanding Escalation Using Notification Method

Use the workflow tools in the PeopleSoft system to streamline the case escalation process and to notify the necessary individuals that the case has been escalated. The system enables you to send email notifications if a case is not closed within a specified period of time. This automates traditionally paper-based tasks with an email-based process throughout the network.

Define workflow structures for each provider group, priority, and level of escalation. Workflow structure setup allows only a single address number at any escalation level. To send the escalation message to multiple people, you must create a distribution list and specify the group within the distribution list at the appropriate escalation level.

When you add a case to the database, the system creates a message within the Work Center (P012501). This message is placed in a mailbox at the provider group level or at the assignee level. If you have defined routing rules, the system assigns the case to the provider group or individual that you assigned in these rules. After the system makes the provider group assignment, it calculates the case commitment date and time by analyzing entitled (service contracts) and unentitled records (which are case type and priority records), workday calendars, and threshold hours. Based on the provider group setup, the case type, and the priority information defined in the Provider Group Revisions program (P17506), the system updates the case record with the escalation date and time and an escalation level of 1. All escalation date and time calculations are based on the commitment date and time that the system calculates using the provider group or contract information. When you run the Escalation processing program (R17680), the system checks for cases requiring escalation.

When the escalation time expires, the system can increase the priority of the case and send notification messages to the provider group members (the distribution list) if the case is assigned to a provider group, or it can send a message to the assignee if the case is assigned to an individual. The system updates the escalation level for the case and awaits a status change, the next level of escalation, or notification. At each escalation level, the system uses the escalation percentage values defined in the F1753 table and the time remaining in the time-to-close to calculate the escalation interval. When you close the case or reach the end of the escalation levels, the case is no longer eligible for escalation.

Understanding Escalation Using Skill-Level Method

If you decide to escalate cases using the skill-level method and have set up routing rules, the system assigns a provider group and an assignee to the case based on the routing rules that have been created. After the system makes the provider group assignment, it calculates the case commitment date and time by analyzing entitled records (that is, service contracts) and unentitled records (case type and priority records), workday calendars, and threshold hours. The escalation routine then assigns the initial provider group member to the case by reviewing and comparing workloads and skill levels of provider group members.

If an assignee is assigned by the routing rules or manually assigned to the case and the assignee is a member of the provider group, the case remains with that assignee until the escalation interval expires. The escalation routine does not process the initial assignment. The case's initial assignee is usually the provider group member with the lowest skill-level value and the fewest number of assigned cases.

At case entry, the system calculates the escalation start event, escalation warning event, and escalation event. The system uses the values defined in the F1753 and F90CG506 tables to assign and process the case through the provider group members assigned to the case. The F90CG506 table stores the assignees and skill levels; the F1753 table stores the escalation percentage values. The values in these tables determine when and for how long a provider member works on a case.

Using the values in the F1753 table, the case escalates through provider group members until the case reaches Closed status or the list of provider group members is exhausted. The most skilled provider group member remains as the assignee if there are not enough provider group members to continue escalating the case. The provider group manager receives all past due notifications for all unresolved cases.

Skill-Level Escalation Example

In this example, Provider Group 1 receives a critical priority case.

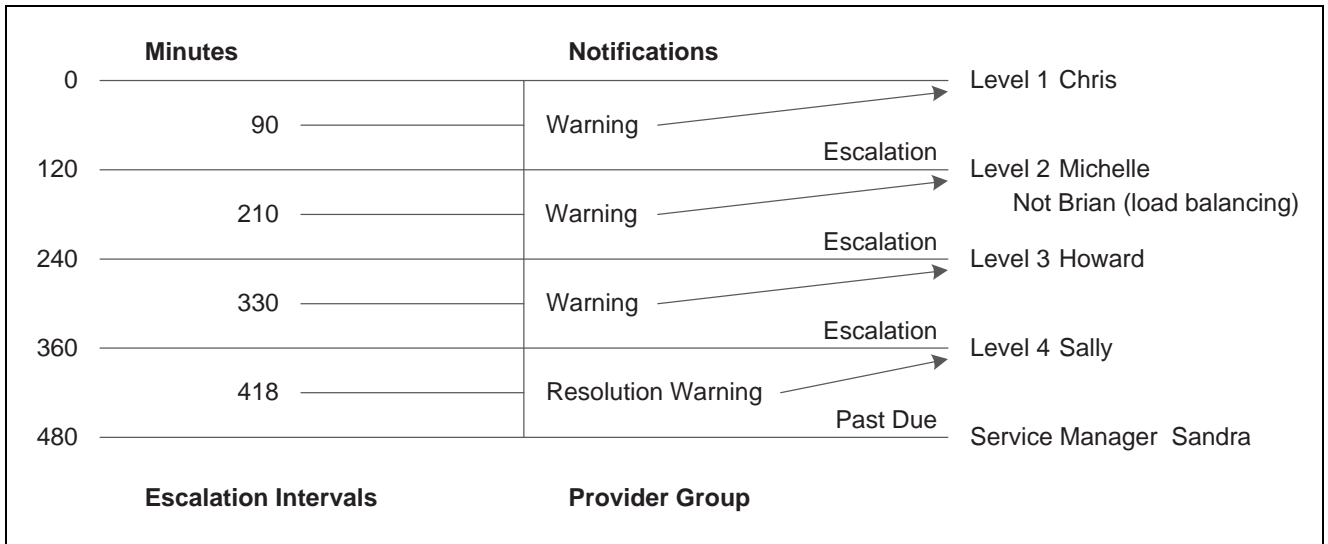
The F1753 table contains these escalation values for this case priority (critical) for this provider group:

- Escalation percentage: 25
- Escalation warning percentage: 25
- Resolution warning percentage: 13

The system determines that the time-to-close is eight hours (or 480 minutes) by using this calculation:

(EnterpriseOne commitment date and time) – (case created date and time)

This graphic illustrates how the system processes the case using skill-level escalation:



Skill-level escalation processing

Each provider group member assigned to the case, has 120 minutes to work on the case before it is escalated to the next skill level. Because of load balancing, the employee named Brian does not receive this case. The system sends escalation warning messages when 30 minutes remain in each escalation interval, and the current assignee receives the message. A resolution warning message is generated when 62 minutes remain in the escalation interval, and Sally receives the resolution warning message. If the case is not resolved within the commitment time, Sandra, the service manager, receives the unresolved case.

Prerequisite

If you are processing escalations using the notification method, ensure that you have:

- Installed the Workflow Modeler so that you can use escalation workflow.
- Set up the S/WM system constants for Escalation 1 (escalation using notification).
- Defined provider groups and associated distribution lists.

If you are processing escalations using the skill-level method, ensure that you have:

- Set up S/WM system constants for Escalation 2 (escalation using skill level).
- Defined provider groups and associated provider group members and skill levels.

Note these considerations when escalating cases:

- Escalation is based on the date and time when a case is first entered and each time that it is escalated.
- Dates and times are based on specific escalation setup for each provider group and priority, or they are based on the generic escalation setup for all provider groups and each priority.

See Also

[Chapter 4, “Setting Up Provider Groups,” Setting Up Provider Groups, page 43](#)

[Chapter 4, “Setting Up Provider Groups,” Setting Up Case Priorities Using Notification Escalation Method, page 54](#)

[Chapter 4, “Setting Up Provider Groups,” Setting Up Priorities Using Skill-Level Escalation Method, page 57](#)

PeopleSoft EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools

Managing Case Escalations Using Skill-Level Escalation Processing

This section provides an overview of escalation processing when parameters change.

Understanding Escalation Processing When Parameters Change

At any time in the escalation process, you can reassign the case to another provider group member, change case priority, adjust commitment date and time, or reassign the case to another provider group. When you change any of these variables in the escalation process, the system adjusts escalation intervals accordingly. This section includes examples of changes in processing during escalations and discusses how the system makes adjustments for these changes.

Case Reassigned to Another Provider Group Member

You can manually promote the case to another provider group member at any time in the escalation process. When you reassign the case to another provider group member, the new assignee receives a full escalation interval, as long as there is adequate time remaining in the promised response time (also called the *time-to-close*).

You can manually reassign a provider group member by:

- Using the Assignee field to search and select a provider group member.

You can reassign the case to a provider group member at any skill level, even a skill level lower than the current assignee. If you reassign the case to a provider group member, the system could still escalate the case back to the current assignee after the full escalation interval has passed. For example, suppose that you reassign the case from a provider group member with skill level 3 to a provider group member with skill level 2. After the escalation interval has passed, the provider group member with skill level 3 could receive the case again.

- Clicking the Re-Routing button.

If you reassign the case by clicking the Re-Routing button, the system uses load-balancing, and it escalates the case to the next available skill level in the provider group.

Unavailable Provider Group Member

If a provider group member is marked as unavailable in the Provider Group Employees program, the system automatically reassigns the case to the next provider group member. The unavailable member does not receive an escalation notification. Managers who are marked as unavailable still receive past due notifications.

Change in Priority

You may need to reassign the case priority during the case escalation process. For example, you can reduce the escalation percentages to escalate the case more quickly through the skill levels. When the priority changes, the case remains with the current assignee, and the current assignee is given a complete escalation interval based on the new priority. The assignee receives a complete escalation interval regardless of when the case priority changes in the escalation process as long as there is adequate time remaining in the time-to-close.

When you change the priority, the commitment date and time could change, depending on whether a service contract is connected to the case. For example, suppose that you change the case priority from 2 to 1, the case is not attached to a service contract, and different values exist for each priority in the Commit Percentage field in the F1753 table. The escalation interval could change. In this example, the case remains with the current assignee, who receives a complete escalation interval based on the new priority; however, that interval changes according to the new response date and time. If the new escalation interval is changed from 12 hours to 8 hours and the escalation percentage changes to 25 percent for the new priority, the assignee receives a complete escalation interval of 120 minutes (25 percent of 8 hours) instead of 180 minutes (25 percent of 12 hours).

Change in Commitment Date and Time

Because of case severity or change in case priority, you might move the case commitment date and time. When you move the commitment date and time for a case, the current assignee retains the case; however, the assignee receives a full escalation interval based on the new commitment date and time, as long as there is adequate time remaining in the time-to-close. For example, if the initial escalation interval is 8 hours, the escalation percentage is 25 percent, and the current assignee has worked on the case for 20 minutes before the commitment date and time changed the escalation interval to four hours, the current assignee retains the case and receive another escalation interval of 60 minutes (25 percent of four hours).

Call Center Closed During Escalation

The system continues to escalate cases even when the call center is closed. Depending on the escalation percentages, skill levels might not receive a case because it is escalated while the call center is closed. In this example, the skill level that receives the case when the call center reopens can manually reassign the case to the initial assignee. The initial assignee receives a full escalation interval, as long as there is adequate time in the time-to-close.

Not Enough Provider Group Members

Depending on the case load, the case type, and the case priority, the escalation routing could exhaust all of the skill levels. In this example, the case remains with the most skilled member until the escalation time expires, and the case is forwarded to the provider group manager; the system does not process escalations or send escalation notices after the case reaches the highest skill level.

Case Reassigned After Resolution Warning Issued

If a case is reassigned after the system issues the resolution warning, the new assignee receives an email message indicating the case commitment date and time, but the assignee does not receive other notifications.

Change in Provider Group

You can reassign the case at any time in the escalation process. You might reassign a case to manually adjust workloads. Or after initial investigation, you might determine that the case should be routed to a provider group that specializes in a particular area.

When you reassign a case to another provider group, the system uses load balancing to assign the case to the least skilled member of the new provider group and initiate the escalation process, according to the case priorities defined for the new provider group.

CHAPTER 10

Working with Computer Telephony Integration (CTI)

Computer Telephony Integration (CTI) is an interface between a telephone system and the Case Management programs. Using CTI, a computer can accept incoming cases and route them to the appropriate device or person.

This chapter discusses how to:

- Set up CTI properties.
- Use CTI.

Note. Complete the steps in this chapter only if you are using CTI. If you are using Multichannel Interaction Manager to route and manage calls, see the Multichannel Interaction Manager PeopleBook.

Setting Up CTI Properties

This section provides an overview of CTI properties and discusses how to set up CTI properties.

Understanding CTI Properties

Set up CTI properties to connect the system applications to the telephony driver. The properties enable you to re-create a keypad for telephone functions.

Form Used to Set Up CTI Properties

Form Name	FormID	Navigation	Usage
CTI Property Revisions	W00094PB	Case Setup (G90CG), CTI Properties Click Add on the Work With CTI Properties form.	Set up CTI properties.

Setting Up CTI Properties

Access the CTI Properties Revisions form.

CTI Properties Revisions form

- Address Number** Enter the address number that you want to direct to the agent.
- Agent ID** Enter the agent ID. This field specifies the agent identifier used to log the agent into the automatic call distributor (ACD).
- ACD Number** (automatic call distributor) Enter the number (without a prefix or special characters such as hyphens or periods) that makes up the telephone number for an entity. You can use any applicable telephone number format for a country. This field is used in conjunction with the Prefix field. You enter the first segment of the telephone number, which is called the area code in the U.S.
- When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book, including any special characters.

Using CTI

This section provides an overview of the use of CTI to access cases and discusses how to use CTI.

Understanding the Use of CTI to Access Cases

When you use CTI, you sign on to the telephone system and access cases through the Case Entry program (P90CG501). You can access the CTI interface and the case interface to perform tasks.

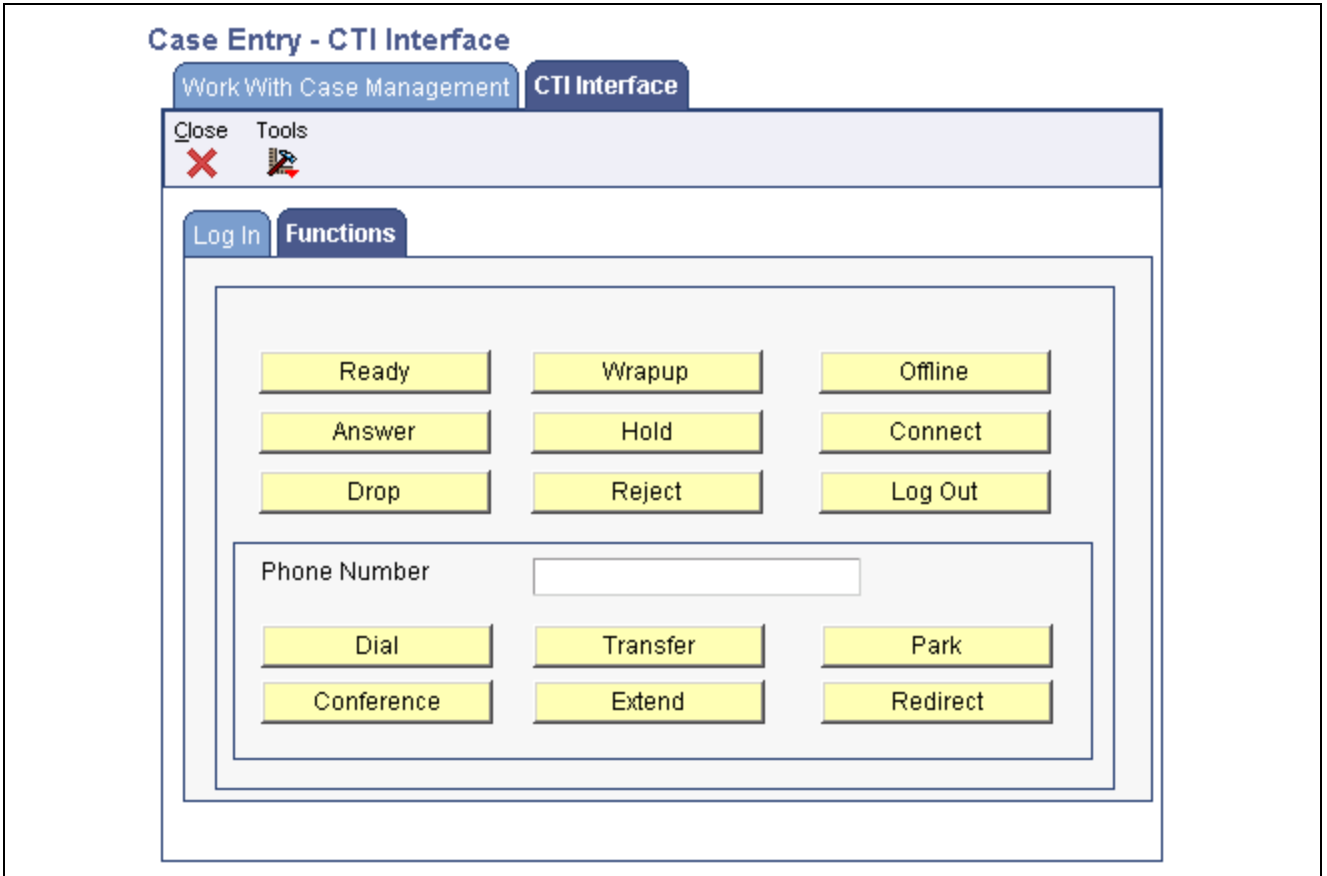
Depending on how you have set up the processing options in the Work With Cases program (P17500), the system automatically displays the CTI interface as you access the Case Entry program.

Form Used to Use CTI

Form Name	FormID	Navigation	Usage
CTI Interface	W00094B	Daily Support Processing (G90CE01), Case Entry Select CTI from the Form menu.	Use CTI.

Using CTI

Access the CTI Interface form. Select the Functions tab.



CTI Interface form: Functions tab

Log on to the CTI interface and then select the Functions tab to use CTI.

CHAPTER 11

Resolving Cases

This chapter provides an overview of case resolution and discusses how to:

- Enter service work orders for cases.
- Close cases.
- Charge time to cases.
- Generate the case workfile.

Understanding Case Resolution

Resolving a case can include finding an answer to a customer's inquiry or problem or entering a work order because the case requires further support. A case remains in *Open* status until it is resolved. To allow for accurate reporting, you must change the status to *Closed* when a case is resolved. To report time, you access the Time Entry program (P17505) if the activity rules are set up to display the Time Entry form as you are closing the case.

Entering Service Work Orders for Cases

This section provides an overview of service work orders and lists the forms used to enter service work orders for cases.

Understanding Service Work Orders

Enter work orders to track requests for on-site or inhouse repair and to track shipments of replacement parts.

Depending on the customer request, you may need to first open a case and then create the service work order, or you may be able to create a service work order that is not attached to an open case. If a case cannot be resolved by a consultant, or if a replacement part is required, you can create a service work order.

Use the Related Actions form in the Case Entry program to enter and revise service work orders connected to cases.

See [Chapter 8, "Entering Cases," Entering and Reviewing Related Actions, page 134.](#)

and

See *PeopleSoft EnterpriseOne Service Management 8.11 SPI PeopleBook*, "Managing Work Orders".

Forms Used to Enter Service Work Orders for Cases

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Select a case and click Select.	Review cases.
CRM Case Related Actions	W90CG503B	Select the Related Actions tab on the Manage Case form.	Review a list of related actions connected to the case.
Add Work Order	W90CD002A	On the CRM Case Related Actions form, select Work Orders as a related action, and click Add.	Enter a service work order related to the case.

Closing Cases

When you resolve a case, you must change the status of the case to close it. After you close the case, you might also need to enter time to bill the customer accurately.

This section discusses how to close a case.

Note. Depending on how the system is set up, the status of the issue might not require you to manually change the case to closed. Instead, the system might close the case.

Form Used to Close Cases

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Select a case and click Select.	Close the case.

Closing a Case

Access the Manage Case form.

Case Status

Enter a value from UDC 17/ST to specify that the case is resolved.

The system updates the time and date when the case is completed. If you set the activity rules to display time entry or failure analysis, the system automatically displays these forms.

Charging Time to Cases

This section provides an overview of case time entry, lists prerequisites, and discusses how to charge time to a case.

Understanding Case Time Entry

When you resolve a case, you must enter time to accurately record the amount of time spent on the case for billing purposes. If you have contract and warranty agreements with customers who do not require billing by the hour, you still might need to report the time for accounting purposes. You can set the processing options to create either payroll batch transactions or general ledger transactions.

Activity rules determine which stages of a case require time entry. You can set up the system to display the Time Entry form at any status change or only when the case is closed.

When you enter a case, the system calculates time entry information based on the time that you accessed the Add Case form and the time that you exited the form. You can override the information, if necessary.

The three methods for using the Case Time Entry program are:

1. Not using case billing with time entry for reporting purposes only.
2. Using case billing with the flat rate pricing method.
3. Using case billing with the time and materials pricing method.

The fields vary on the Case Time Entry form depending on which method you use. When case billing is not used, the fields are identical to flat rate billing except the Uploaded to Table and Date Uploaded fields do not appear.

Note. If the case has already been billed, you cannot change the billing information.

Prerequisites

To access billing information and enter billable time, you must:

- Activate the Bill for Cases processing option for the Case programs.
- Set up the case activity rules to define at what status the time entry form displays.

See [Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Processing Options for Case Management, page 19.](#)

and

See [Chapter 3, “Setting Up Case Management Fundamentals,” Setting Up Activity Rules, page 37.](#)

Form Used to Charge Time to Cases

Form Name	FormID	Navigation	Usage
Manage Case	W90CG501J	Daily Support Processing (G90CE01), Case Entry Locate the case and click Select. Change the case status to a status that displays the time entry form.	Enter time information.

Charging Time to a Case

Access the Case Time Entry form.

Case Entry - Case Time Entry

Case Info | G/L Codes | Billing

Request Number: 36 CL

Responsible Business Unit: M30 Company: 00200

Customer Number: 3334 Lewis Enterprises

Site Number: 3334 Lewis Enterprises

Coverage Group:

Service Provider Number	Service Provider Name	Description	Cost Type	Actual Hours	Labor Unit of Measure	Costing Rate	Scheduled Start Date	Start Time
8893165	Jillian Smith	Research	B1	1.00	HR		10/19/04	20:16:00

Case Time Entry form

Service Provider Number

Enter the service provider's address book number. If you enter a value other than the address book number, such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the address book number in this field.

Cost Type

Enter the code that designates each element of cost for an item. Examples of the cost object types are:

A1: Purchased raw material.

B1: Direct labor routing roll-up.

B2: Setup labor routing roll-up.

CI: Variable burden routing roll-up.

C2: Fixed burden routing roll-up.

Dx: Outside operation routing roll-up.

Xx: Extra add-ons, such as electricity and water.

The optional add-on computations usually operate with the type *Xx*. This cost structure enables you to use an unlimited number of cost components to calculate alternative cost roll-ups. The system then associates these cost components with one of six user defined summary cost buckets.

Actual Hours

Enter the number of hours associated with each transaction.

Labor Unit of Measure

Enter a value from UDC 00/UM to identify the unit of measurement for an amount or quantity. For example, it can represent a barrel, box, cubic meter, liter, hour, and so on.

Costing Rate

Enter the employee's hourly rate, which is retrieved during time entry. If you enter a rate in this field on any other form, that rate can override the value in the F060116 table.

In the F060116 table, this number is the employee's base hourly rate.

In the F069126 table, this number is the straight time rate.

Note. If you change the number of the data display decimal digits for this field, you must also change the Rate - Base Hourly and Rate - Hourly fields so that they have the same number of data display decimal digits.

Scheduled Start Date	Enter the start date for the work order. You can enter this date manually or have the system calculate it using a backscheduling routine. The routine starts with the required date and offsets the total leadtime to calculate the appropriate start date.
Start Time	Enter the amount of time that has elapsed between the date and time that you entered the case and the date and time that you assign the case.
End Date	Enter the date that the work order or engineering change order is completed or canceled.
End Time	Enter the amount of time that has elapsed between the date and time that you enter the case and the date and time that you assign the case.
Account Number	<p>Enter the value that identifies an account in the general ledger. Use one of these formats to enter account numbers:</p> <p>Standard account number (business unit.object.subsidiary or flex format).</p> <p>Third general ledger number (maximum of 25 digits).</p> <p>Account ID number; the number is eight digits long.</p> <p>Speed code, which is a two-character code that you concatenate to the AAI item; you can then enter the code instead of an account number.</p> <p>The first character of the account number indicates its format. You define the account format in the General Accounting constants.</p> <p>The system retrieves the account number based on the account number that was set up for a service provider or consultant in the SWM (Service and Warranty Management) address book information.</p>
PDBA Code (pay, deduction, benefit, or accrual code)	<p>Enter the code that defines the type of pay, deduction, benefit, or accrual. Pay types are numbered from 1 to 999. Deductions and benefits are numbered from 1000 to 9999.</p>
Percentage Covered	Enter the percentage covered under warranty or contract. This value is used to calculate the amount to bill or the amount to cost for the line item that is processed on the service order or case.
Billable	<p>Enter a value that specifies whether a general ledger account should be billed. Values are:</p> <p><i>Y</i>: Yes, the account should be billed.</p> <p><i>N</i>: No, it should not be billed.</p> <p><i>I</i>: It is eligible only for invoicing.</p> <p><i>2</i>: It is eligible only for revenue recognition.</p> <p><i>4</i>: It is eligible only for cost.</p>

Note. Codes 1, 2, and 4 relate only to the Service Billing system.

P.O. Number	Enter an alphanumeric value used as a cross-reference or secondary reference number. Typically, this is the customer number, supplier number, or job number.
Adjustment Schedule	Enter a value from UDC 40/AS to identify a price and adjustment schedule. A price and adjustment schedule contains one or more adjustment types for which a customer or an item might be eligible. The system applies the adjustments in the sequence that you specify in the schedule. You link customers to a price and adjustment schedule through the customer billing instructions. When you enter a case, the system copies the schedule that is attached to the sold-to address into the order. You can override this schedule at the header level.
Price Effective Date	Enter the price effective date. The system uses this field to determine the base price and all advanced price adjustments. The value loaded in this date is stored in the F4009 table.
Billable Hours	Enter the number of hours billed.
Minimum Billable Hours	Enter the minimum number of hours to charge the customer. If the billable number of hours is less than the minimum number of hours, then the system charges the customer for the minimum number of hours instead of the billable number of hours.
Billing Rate	Enter the billing rate that the system uses when calculating the billable amount. The billing rate is expressed in the currency that is set up for the company that initiates the transaction.
Minimum Billable Amount	Enter the minimum monetary amount to charge the customer. If the billable amount is less than the minimum amount, the system charges the customer for the minimum amount instead of the billable amount. This monetary amount is expressed in the currency of the company.
Discount Method	Specify the discount method. On the Item Price Category Revisions form, a \$ indicates that the numeric type is an added amount, a % indicates that the factor is a multiplier.
Discount Percent	Enter the takeoff pricing file discount percentage
Discount Amount	Enter the amount of the discount available, as opposed to the amount of the discount actually taken. The discount calculated is based on the invoice amount rather than the revenue amount.
Taxable	Enter the code that indicates whether the item is subject to sales tax when you sell it. The system calculates tax on the item only if the customer is also taxable.
Tax Explanation Code	Enter a value from UDC 00/EX that controls the algorithm that the system uses to calculate tax and general ledger distribution amounts. The system uses the tax explanation code in conjunction with the tax rate area and tax rules to determine how the tax is calculated. Each transaction pay item can be defined with a different tax explanation code.
Tax Rate/Area	Enter the code that identifies a tax or geographic area that has common tax rates and tax authorities. The system validates the code that you enter against the F4008 table. The system uses the tax rate area in conjunction with the tax explanation code and tax rules to calculate tax and general ledger distribution amounts when you create an invoice or voucher.

Bill To Number and Send Invoice To Number

Enter the user-defined name or number that identifies the bill to address book number, or enter the send invoice address book number. If you enter a value other than the address book number, such as the long address or tax ID, you must precede it with the special character that is defined in the Address Book constants. When the system locates the record, it returns the address book number in this field.

For example, if address book number 4100 (total solutions) has a long address of *TOTAL*, and an asterisk (*) distinguishes it from other entries (as defined in the Address Book constants), you might type **TOTAL* in the field, and the system returns *4100*.

Note. You can use the Send Invoice To Number to locate and enter information about the address book record.

Generating the Case Workfile

This section provides an overview of the case workfile and discusses how to set processing options for the Case Workfile Generation program (R17675).

Understanding the Case Workfile

When you run the Case Workfile Generation program, the system processes records in the F1755 and the F1760 tables.

When you run the generation program in final mode, the system creates billing records in the F4812 table and updates the case record with the date billed. The Service Billing system then creates workfile transactions that are used by the Accounts Receivable and General Accounting systems.

Important! When you have billed a case in final mode, you cannot change it.

Form Used to Generate Case Workfile

Form Name	FormID	Navigation	Usage
Work With Batch Versions - Available Versions	W98305WA	Case (G90CE0201), Case Workfile Generation	Generate the case workfile.

Setting Processing Options for Case Workfile Generation (R17675)

Processing options enable you to specify the default processing for programs and reports.

Process

These processing options specify whether to run the program in proof or final mode, and whether the system writes errors to the report or to the Work Center.

1. Proof or Final Mode

Specify whether to run the program in proof or final mode. Final mode updates all records. If you leave this processing option blank, the system generates the program in proof mode and does not update records. Values are:

Blank: Proof mode.

I: Final mode.

2. Work Center Or Report Specify whether the system writes errors to the Work Center or to the report. Values are:

Blank: Write errors to the Work Center.

I: Write errors to the report.

Display

This processing option specifies whether to print domestic or foreign currency amounts on the report.

1. Print Domestic or Foreign Specify whether to print domestic or foreign currency amounts on the report. If you leave this processing option blank, the system prints foreign currency amounts. If foreign currency amounts do not exist, the system prints domestic currency amounts. Values are:

D: Domestic currency.

F: Foreign currency.

Defaults

These processing options specify the value to use in the Subledger field when you create billing transactions, and the billing date to use.

1. Subledger Specify the subledger value that the system uses when you create billing transactions. Values are:

Blank: No subledger value.

1: Case number.

2: Customer number.

3: Site number.

4: Item number.

5: Contract number.

6: Equipment number

2. Date Billed Specify the date that the system uses when you create billing transactions. The system updates this field only when you run the report in final mode. Values are:

Blank: System date.

1: Case beginning date.

Vertex

These processing options specify the Vertex transaction type to use when calculating taxes for billings.

1. Vertex Transaction Type for Labor Billings and 2. Specify the Vertex transaction type that the system uses when calculating taxes for time entry billing or flat rate billing. Only use this transaction type if you are billing for cases and the pricing method is Time and Materials.

Enter a value from UDC 73/TY (Vertex Transaction Type). If you leave this processing option blank, the system uses transaction type *SERVIC*.

Note. Use Vertex Transaction Type for Flat Rate Billings only if you are billing for cases and the pricing method is flat rate.

APPENDIX A

Delivered Workflow for PeopleSoft EnterpriseOne CRM Support Applications

This appendix discusses the delivered workflow for PeopleSoft EnterpriseOne CRM Support Applications.

See Also

EnterpriseOne Tools 8.95 PeopleBook: Workflow Tools

Delivered Workflow for PeopleSoft EnterpriseOne CRM Support Applications

This section discusses the PeopleSoft EnterpriseOne CRM Support Applications workflow.

Halt Workflow

This section discusses the Halt workflow.

Description

Workflow Description	The system halts the workflow until the time to send a warning message, and then halts the workflow again until the time to escalate. There is a business function that recursively creates K90CG01 until the end of the calculated time.
Workflow Trigger	The time elapses to send a warning message, and the time elapses to escalate.
Workflow Action	The business function is initiated.

Workflow Objects

System	90CG
Workflow Object Name	K90CG01
Object ID	N90CG01
Event Description / Function Name	StartCaseEscalationWorkflow
Sequence / Line Numbers	4

Past Due Message

This section discusses the Past Due Message workflow.

Description

Workflow Description	The system sends the past due message to the manager.
Workflow Trigger	The allocated time elapses, and the case status has not been changed to closed.
Workflow Action	An email is sent to the manager as notification that the case is being escalated to the next provider group member.

Workflow Objects

System	90CG
Workflow Object Name	K90CG06
Object ID	N90CG01
Event Description / Function Name	StartCasePastDueMessageWF
Sequence / Line Number	4

Past Due Work Flow

This section discusses the Past Due Work Flow.

Description

Workflow Description	Triggers the sending of a "past due warning message" and a "past due message". Also, reassigns case to manager when past due.
Workflow Trigger	Instantiation occurs when: <ol style="list-style-type: none"> 1. a case is created, or 2. a case is updated with a new commitment date/time
Workflow Action	K90CG02 halts until a percentage of the commitment time of a case has expired. This percentage value is configurable by the user. At this point, a business function is called that instantiates a K90CG05 work flow, which in turn sends an email (past due warning message) message to whoever the current assignee is on the case. Then K90CG02 halts again until the entire commitment time has expired. At this point, a business function is called which reassigns the case to the manager of the assigned provider group, and instantiates a K90CG06 work flow, which in turn sends an email (past due message) message to the manager of the assigned provider group on the case.

Workflow Objects

System	90CG
Workflow Object Name	K90CG02
Object ID	N90CG01
Event Description / Function Name	StartCasePastDueWorkflow
Sequence / Line Number	4

Escalation Message

This section discusses the Escalation Message workflow.

Description

Workflow Description	The system sends the escalation message to the next assignee.
Workflow Trigger	The lower-level provider group member does not change the case status to closed.
Workflow Action	The system sends an email to the provider group member at the next level.

Workflow Objects

System	90CG
Workflow Object Name	K90CG07
Object ID	N90CG01
Event Description / Function Name	StartEscalationPeriodExpireMsg
Sequence / Line Number	4

Escalation Warning

This section discusses the Escalation Warning workflow.

Description

Workflow Description	The system sends an escalation warning message.
Workflow Trigger	The lower-level provider group member does not change the case status to closed within the time allotted.
Workflow Action	The system sends an email notification to the case assignee that the case is being escalated within a specified time if the case is not closed.

Workflow Objects

System	90CG
Workflow Object Name	K90CG03
Object ID	N90CG01
Event Description / Function Name	StartEscalationWarningMessageW
Sequence / Line Number	4

Initial Escalation Message

This section discusses the Initial Escalation Message workflow.

Description

Workflow Description	The system sends the message to the person in the workflow who is initially assigned the case.
Workflow Trigger	The case is created and assigned to a provider group member.
Workflow Action	The system sends an email to the provider group member as notification of case assignment.

Workflow Objects

System	90CG
Workflow Object Name	K90CG04
Object ID	N90CG01
Event Description / Function Name	StartInitialAssignmentMessageW
Sequence / Line Number	4

Past Due Warning Message

This section discusses the Past Due Warning Message workflow.

Description

Workflow Description	The system sends a past due warning message.
Workflow Trigger	The assigned provider group member does not change the case status to closed within the allocated time.
Workflow Action	An email is sent to the provider group manager.

Workflow Objects

System	90CG
Workflow Object Name	K90CG05
Object ID	N90CG01
Event Description / Function Name	StartPastDueWarningMessageWF
Sequence / Line Number	3

Process Call Status Change

This section discusses the Process Call Status Change workflow.

Description

Workflow Description	The system sends a message if the status is changed to a closed status (the case is closed).
Workflow Trigger	A change in the status of a case.
Workflow Action	Customers will receive notifications that their cases have been closed.

Workflow Objects

System	17
Workflow Object Name	CALLSTATUS
Object IDs	W90CG504A, W90CG501J
Event Description / Function Name	Post OK Button Clicked, Post Save Button Clicked
Sequence / Line Numbers	69, 71

Call Escalation Workflow Process

This section discusses the Call Escalation Workflow Process workflow.

Description

Workflow Description	The system sends a message to a user-defined distribution list if the case is not closed before the escalation date and time.
Workflow Trigger	Running the R17680 program, and the case is not closed before the escalation date and time.
Workflow Action	A user-defined distribution list will be notified if cases are not closed before the escalation date and time.

Workflow Objects

System	17
Workflow Object Name	CALLESCAL
Object ID	R17680
Event Description / Function Name	Do Section
Sequence / Line Number	62

APPENDIX B

PeopleSoft EnterpriseOne CRM Support Applications Reports

This appendix provides an overview of PeopleSoft EnterpriseOne CRM Support Applications reports and enables you to view summary tables for all reports.

Note. For samples of these reports, see the PDF files that are published on CD-ROM with the documentation.

PeopleSoft EnterpriseOne CRM Support Applications Reports: A to Z

These tables list the PeopleSoft EnterpriseOne CRM Support Applications reports.

This section discusses CRM reports in these categories:

- Support applications
- Action plan/activity
- Competitor
- Customer
- Employee
- Partner
- Contact
- Product catalog

Support Applications Reports

Report ID and Report Name	Description	Navigation
R17670 Case Detail/Summary Report	Run different versions of this report to display and organize detail or summary information for closed cases. Versions have been set up to organize cases using these methods: <ul style="list-style-type: none"> • Case by provider group – version XJDE0001 • Case by product model – version XJDE0002 • Case by environment – version XJDE0003 • Case by equipment number – version XJDE0004 	Case (G90CE0201), Case Detail Summary Report
R17671 Case Statistics by Assignee	Use this report to create reports that display close cases by: <ul style="list-style-type: none"> • Assignee – version XJDE0001 • Provider group – version XJDE0002 	Case (G90CE0201), Case Statistics by Assignee
R17672 Case Statistics by Product	Use this report to create reports that display closed case statistics and organize the report by any of these methods: <ul style="list-style-type: none"> • Cases by product model – version XJDE0001 • Cases by environment – version XJDE0002 • Cases by equipment number – version XJDE0003 • Cases by item number – version XJDE0004 • Cases by provider group – version XJDE0005 	Case (G90CE0201), Case Statistics by Product

Report ID and Report Name	Description	Navigation
R17673 Case Duration Statistics by Product	<p>Use this report to create reports that display the duration of closed cases and organize the report by any of these methods:</p> <ul style="list-style-type: none"> • Cases by product model – version XJDE0001 • Cases by environment – version XJDE0002 • Cases by equipment number – version XJDE0003 • Cases by item number – version XJDE0004 • Cases by provider group – version XJDE0005 	Case (G90CE0201), Case Statistics by Product
R17674 Print Case	Use this report to print case information. Through the processing options, you can specify to print associated media objects.	Case (G90CE0201), Case Print
R17680 Escalated Cases	<p>If you are escalating cases using the notification method, run this report to check for cases that the system needs to escalate.</p> <p>See Chapter 9, “Working with Escalations,” Escalating (Promoting) Cases, page 139.</p>	Case (G90CE0201), Escalation Processing
R90CG700 Cases by Customers Report	Use this report to review cases by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each customer.	Case (G90CE0201), Cases By Customer
R90CG701 Cases by Priority Report	Use this report to view cases organized by priority (user defined code [UDC] 17/PR). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each case priority.	Case (G90CE0201), Cases By Priority
R90CG702 Cases by Status Report	Use this report to view cases organized by status (UDC 17/ST). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each status.	Case (G90CE0201), Cases By Status

Report ID and Report Name	Description	Navigation
R90CG703 Cases By Type Report	Use this report to view cases organized by type (UDC 17/CT). Cases are then sub-grouped by customer. The last page of this report contains a summary that lists the quantity of case records included in the report for each case type.	Case (G90CE0201), Cases By Type
R90CG704 Cases Status By Agent Report	Use this report to review case status organized by call center agent.	Case (G90CE0201), Cases Status By Agent
R90CG705 Case Analysis By Product Family	Use this report to review case information organized by product family (UDC 17/PA).	Case (G90CE0201), Case Analysis By Product Family

Action Plan/Activity Reports

Report ID and Report Name	Description	Navigation
R90CA014A Action Plan List	Use this report to view all summary information about all action plans, such as the description of the plan and the list of included activities. The report also includes additional information about each activity, such as the activity type, the assignee, when the activity should begin, and when the activity should be completed.	Action Plan/Activity (G90CE0202), Action Plan Listing
R90CA1301B Activities by a Customer Contact	Use this report to view all assigned activities for each customer. The activities are grouped by customer and include each activity's contact name, phone number, description, date scheduled, start time, and activity type.	Action Plan/Activity (G90CE0202), Activity-Activities By Customer
R90CA13D Periodic Planner	Use this report to display selected user schedules, including activities and to-do items, for a specified period of time. The report also includes all related details for each activity or to-do item.	Action Plan/Activity (G90CE0202), Activity-Periodic Planner

Competitor Reports

Report ID and Report Name	Description	Navigation
R90CA060A Competitor Item Sheet Detail	Use this report to view all information about a competitor and the competitor's products. You can use this report to compare the products from the organization with those of the competitors.	Competitor (G90CE0203), Competitor Price Selected

Customer Reports

Report ID and Report Name	Description	Navigation
R90CA0111A Contacts for a Customer	Use this report to view each contact, along with the associated contact information for each selected customer.	Customer (G90CE0204), Contacts By Customer
R90CA080B Customer/Contact Summary-Sel	Use this report to view summary information for all customer records in the system. The report includes the associated contact names for each customer, along with information for each contact.	Customer (G90CE0204), Customer Contact Summary
R90CA080G Customer Summary - Selected	Use this report to view summary information about selected customers, such as sales team members, opportunities, and contacts.	Customer (G90CE0204), Customer Summary

Employee Report

Report ID and Report Name	Description	Navigation
R90CA0101E Employee Phone List	Use this report to view all active employees in the system, along with their titles and phone numbers.	Employee (G90CE0205), Employee Phone List

Partner Report

Report ID and Report Name	Description	Navigation
R90CA01B Customer Partner List	Use this report to view all partners in the system, along with summary information about each partner, such as the name, address, contact information, and URL.	Partner (G90CE0206), Partner List

Contact Reports

Report ID and Report Name	Description	Navigation
R90CA070AA Contact Address Avery 5163	Use this report to produce shipping labels for each contact in the system in Avery 5163 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5163)
R90CA070B Contact Address Avery 5160	Use this report to produce mailing labels for each contact in the system in Avery 5160 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5160)
R90CA070C Contact Address Avery 5161	Use this report to produce mailing labels for each contact in the system in Avery 5161 label format. The report includes each contact's name, company name, street address, city, state, postal code, and country.	Case (G90CE0201), Contact Address Shipping (Avery 5161)

Product Catalog Report

Report ID and Report Name	Description	Navigation
R90CA55CAT Product Catalog List	Use this report to view all product catalogs, along with the available products that are associated with each catalog.	Product Catalog (G90CE0108), Product Catalog List

PeopleSoft EnterpriseOne CRM Support Applications Selected Reports

This section provides detailed information about individual reports, including important processing options and tables accessed. The reports are listed alphanumerically by report ID.

R17670 – Case Detail/Summary

This report is based on closed cases. You can review detail or summary information for cases, based on processing options for the version. When you run the detail report, the system lists all cases, as well as the total number of closed cases. When you run the summary report, the system only lists the total number of closed cases.

Run different versions of this report to review cases organized by:

- Provider group – version XJDE0001.
- Product model – version XJDE0002.

- Environment – version XJDE0003.
- Equipment number – version XJDE0004.

Processing Options for Case Detail/Summary Report (R17670)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing options on this tab define the defaults that the system uses when you run the Case Detail/Summary report.

- | | |
|--|--|
| 1. Print Product Model or Item Number | Specify whether the system includes the product model or the item number on the Case Detail report or the Case Summary report. Values are:

Blank: Product model
<i>I</i> : Item number |
| 2. From Date and 3. Thru Date | Specify the from date or the through date.
<hr/> Note. If you leave the Thru Date processing option blank, the system uses the current date. <hr/> |

Print

- | | |
|------------------------|--|
| 1. Print Report | Specify whether the system generates the Case Summary report or the Case Detail report. Values are:

Blank: Case Summary
<i>I</i> : Case Detail |
|------------------------|--|

Processing Options for Case Statistics by Assignee (R17671), Case Statistics by Product (R17672), and Case Duration Statistics by Product (R17673)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing options on this tab define the default values that the system uses when you run the report.

- | | |
|--------------------------------------|--|
| 1. From Date and 2. Thru Date | Specify the from date or the through date.
<hr/> Note. If you leave the Thru Date processing option blank, the system uses the current date. <hr/> |
| 3. Case Type for Handled Live | Specify the case type for live requests. Live requests are from customers who speak to a representative on the first call. The request types appear in the request statistics on the report. Enter a value from UDC 17/CT. |

- 4. Closed Case Status** Specify the status for closed cases. Cases with this status appear in the statistics on the report. Enter a value from UDC 17/ST.

Processing Options for Case Print Report (R17674)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Print

- 1. Print Media Object** Specify whether to include associated media objects on the report. Values are:
Blank: Do not include.
I: Include.

Processing Options for Escalation Processing Report (R17680)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Print

- 1. Display Cases Processed for Escalation** Specify whether the system displays cases that are not escalated. Values are:
Blank: Print both escalated and not escalated cases.
I: Print only escalated cases.

Processing Options for Employee Phone List Report (R90CA0101E)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

These processing options specify default information that is used to process the report.

- 1. Enter Search Type for an Employee:** Specify the search type from UDC 01/ST that is used to identify employees.
- 2. Enter Phone Number Type for Business Phone:** Specify the business phone type from UDC 01/PH.

Processing Options for Contacts for a Customer Report (R90CA0111A)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing options on this tab specify the default information that is used to process the report.

- 1. Enter Phone Number Type for Business phone:** Specify the business phone type or the fax phone type from UDC 01/PH.
and 2. Enter Phone Number Type for Fax number:
- 3. Enter Type - Address for Work Address:** Specify the work address type from UDC 01/AT.

Processing Options for Customer Partner List Report (R90CA01B)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing options on this tab specify the default information that is used to process the report.

- 1. Enter Phone Number Type for Business phone:** Specify the business phone type or the fax phone type from UDC 01/PH.
- 3. Enter Electronic Address Type for Internet Address (url):** Specify the internet address type from UDC 01/ET.

Processing Options for Contact Address Avery 5163 Report (R90CA070AA), Contact Address Avery 5160 Report (R90CA070B), and Contact Address Avery 5161 Report (R90CA070C)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

- 1. Enter the Search Type for a Customer:** Specify the customer search type from UDC 01/ST.

Processing Options for Customer/Contact Summary – Sel Report (R90CA080B)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing options on this tab specify the default information that is used to process the report.

- 1. Enter Phone Number Type for Business phone:** Specify the business phone type from UDC 01/PH.

2. Enter Electronic Address Type for Internet Address (url): and **3. Enter Electronic Address Type for Email address:** Specify the internet address type or the email address type from UDC 01/ET.

4. Enter Type - Address for Work Address: Specify the work address type from UDC 01/AT.

Processing Options for Customer Summary – Selected Report (R90CA080G)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing options on this tab specify the default information that is used to process the report.

1. Enter Phone Number Type for Business phone: Specify the business phone type, mobile phone type, or fax phone type from UDC 01/PH.

2. Enter Phone Number Type for mobile phone:, and
3. Enter Phone Number Type for fax number:

4. Enter Electronic Address Type for url (Internet Address): Specify the internet address type from UDC 01/ET.

R90CA1301B – Activities By A Customer Contact

This report includes all assigned activities for each customer. The activities are grouped by customer, and include each activity's contact name, phone number, description, date scheduled, start time, and activity type.

Processing Options for Activities By A Customer Contact Report (R90CA1301B)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Defaults

The processing option on this tab specifies the default information that is used to process the report.

1. Enter Phone Number Type for Business phone Specify which customer phone number to print on the report. Values are stored in the UDC 01/PH table.

R90CA13D – Periodic Planner

This report displays selected user schedules, including activities and to-do items, for a specified period of time. The report also includes all related details for each activity or to-do item.

Processing Options for Periodic Planner (R90CA13D)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Process

- 1. Start Date and 2. End Date** Specify the beginning date or the end date in the date range for which you want to track lead information. If you leave this processing option blank, the system uses current date.

Print

- 1. Include "Task" Section** Specify whether the system prints the Task section on the report. If you leave this option blank, the system includes the Task section and the Activities section on the report. If you enter *1* in this option, the system includes only the Activities section on the report. Values are:

Blank: Include.

1: Do not include.

Processing Options for Cases by Customers Report (R90CG700), Cases by Priority Report (R90CG701), Cases by Status Report (R90CG702), and Cases By Type Report (R90CG703)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Process

- 1. From Date and 2. Through Date** Specify the from date or the through date. If you leave this processing option blank, the system uses the current date.

Print

- 1. Print Report** Specify whether the system prints summary, detail, or summary and detail case information. Values are:

Blank: Case detail and summary information.

1: Case detail information.

2: Case summary information.

Processing Options for Cases Status By Agent Report (R90CG704) and Case Analysis By Product Family Report (R90CG705)

For programs, you can specify options such as the default values for specific transactions, whether fields appear on a form, and the version of the program that you want to run.

Process

1. From Date and 2. Through Date

Enter the from date or the through date. If you leave this processing option blank, the system uses the current date.

Glossary of PeopleSoft Terms

activity	A scheduling entity in PeopleSoft EnterpriseOne Form Design Aid that represents a designated amount of time on a calendar.
activity rule	The criteria by which an object progresses from one given point to the next in a flow.
add mode	A condition of a form that enables users to input data.
Advanced Planning Agent (APAg)	A PeopleSoft EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of relational databases, flat file format, and other data or message encoding, such as XML.
application server	A server in a local area network that contains applications shared by network clients.
as if processing	A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.
alternate currency	<p>A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.</p> <p>In PeopleSoft EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.</p>
as of processing	A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various PeopleSoft EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.
back-to-back process	A process in PeopleSoft EnterpriseOne Workflow Management that contains the same keys that are used in another process.
batch processing	<p>A process of transferring records from a third-party system to PeopleSoft EnterpriseOne.</p> <p>In PeopleSoft EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than EnterpriseOne to PeopleSoft EnterpriseOne Accounts Receivable and PeopleSoft EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to PeopleSoft EnterpriseOne.</p>
batch server	A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.
batch-of-one immediate	<p>A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.</p> <p>See also direct connect and store-and-forward.</p>
business function	A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through

	event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	See named event rule (NER).
business view	A means for selecting specific columns from one or more PeopleSoft EnterpriseOne tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.
central objects merge	A process that blends a customer's modifications to the objects in a current release with objects in a new release.
central server	A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical PeopleSoft EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.
charts	Tables of information in PeopleSoft EnterpriseOne that appear on forms in the software.
connector	Component-based interoperability model that enables third-party applications and PeopleSoft EnterpriseOne to share logic and data. The PeopleSoft EnterpriseOne connector architecture includes Java and COM connectors.
contra/clearing account	A general ledger account in PeopleSoft EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in PeopleSoft EnterpriseOne General Accounting.
Control Table Workbench	An application that, during the installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
cost assignment	The process in PeopleSoft EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.
cost component	In PeopleSoft EnterpriseOne Manufacturing Management, an element of an item's cost (for example, material, labor, or overhead).
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.
database server	A server in a local area network that maintains a database and performs searches for client computers.
Data Source Workbench	An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail information	Information that relates to individual lines in PeopleSoft EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between PeopleSoft EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.
enterprise server	A server that contains the database and the logic for PeopleSoft EnterpriseOne or PeopleSoft World.
EnterpriseOne object	A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.
EnterpriseOne process	A software process that enables PeopleSoft EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. PeopleSoft EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System-release number data source. It also updates the Environment Plan detail record to reflect completion.
escalation monitor	A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a <i>business unit</i> .
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network user request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
interface table	See Z table.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access PeopleSoft EnterpriseOne.
in-your-face-error	In PeopleSoft EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	Developed by PeopleSoft, this internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.
jargon	An alternative data dictionary item description that PeopleSoft EnterpriseOne or People World displays based on the product code of the current object.
Java application server	A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other's data.
JDEBASE Database Middleware	A PeopleSoft proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A PeopleSoft file (or member for iSeries) that provides the runtime settings required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running PeopleSoft EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log	The main diagnostic log file of PeopleSoft EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of PeopleSoft EnterpriseOne.
JDENET	PeopleSoft proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all PeopleSoft EnterpriseOne supported platforms.
Location Workbench	An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.
logic server	A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when PeopleSoft EnterpriseOne and World software runs.
MailMerge Workbench	An application that merges Microsoft Word 6.0 (or higher) word-processing documents with PeopleSoft EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.
master business function (MBF)	An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.
master table	See published table.
matching document	A document associated with an original document to complete or change a transaction. For example, in PeopleSoft EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.
media storage object	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
message center	A central location for sending and receiving all PeopleSoft EnterpriseOne messages (system and user generated), regardless of the originating application or user.
messaging adapter	An interoperability model that enables third-party systems to connect to PeopleSoft EnterpriseOne to exchange information through the use of messaging queues.
messaging server	A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.
named event rule (NER)	Encapsulated, reusable business logic created using event rules, rather than C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.
<i>nota fiscal</i>	In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.
<i>nota fiscal factura</i>	In Brazil, a nota fiscal with invoice information. See also <i>nota fiscal</i> .

Object Configuration Manager (OCM)	In PeopleSoft EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.
Object Librarian	A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of PeopleSoft EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.
Object Librarian merge	A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.
Open Data Access (ODA)	An interoperability model that enables you to use SQL statements to extract PeopleSoft EnterpriseOne data for summarization and report generation.
Output Stream Access (OSA)	An interoperability model that enables you to set up an interface for PeopleSoft EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.
package	EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snap shot of the central objects on the deployment server.
package build	A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in PeopleSoft EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build. Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”
package location	The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.
Package Workbench	An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the System-release number data source. It also updates the Package Plan detail record to reflect completion.
PeopleSoft Database	See JDEBASE Database Middleware.
planning family	A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.
preference profile	The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.
print server	The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.
pristine environment	A PeopleSoft EnterpriseOne environment used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option	A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.
production environment	A PeopleSoft EnterpriseOne environment in which users operate EnterpriseOne software.
production-grade file server	A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or disks.
project	In PeopleSoft EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.
promotion path	<p>The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):</p> <p>11>21>26>28>38>01</p> <p>In this path, <i>11</i> equals new project pending review, <i>21</i> equals programming, <i>26</i> equals QA test/review, <i>28</i> equals QA test/review complete, <i>38</i> equals in production, <i>01</i> equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.</p>
proxy server	A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.
published table	Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the PeopleSoft methods for replicating data to individual workstations. Such machines are set up as pull subscribers using PeopleSoft EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.
QBE	An abbreviation for query by example. In PeopleSoft EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.
real-time event	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other PeopleSoft systems that have requested notification when certain transactions occur.
refresh	A function used to modify PeopleSoft EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.
replication server	A server that is responsible for replicating central objects to client machines.
quote order	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In PeopleSoft EnterpriseOne Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on PeopleSoft menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the System-release number data source. It also updates the Server Plan detail record to reflect completion.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a PeopleSoft EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	<p>Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs.</p> <p>For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across PeopleSoft EnterpriseOne systems.</p>
table access management (TAM)	The PeopleSoft EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between PeopleSoft EnterpriseOne and third-party systems using non-PeopleSoft EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although PeopleSoft EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in PeopleSoft EnterpriseOne.
three-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) monitor	A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In PeopleSoft EnterpriseOne Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In EnterpriseOne Project Costing and EnterpriseOne Manufacturing Management, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.
Version List merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific PeopleSoft EnterpriseOne or World form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

workbench	A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of PeopleSoft EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.
work day calendar	In EnterpriseOne Manufacturing Management, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
workflow	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
workgroup server	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture PeopleSoft EnterpriseOne transactions as they occur and then calls third-party software, end users, and other PeopleSoft systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into PeopleSoft EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive PeopleSoft EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one PeopleSoft EnterpriseOne system and receive a response from another PeopleSoft EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from PeopleSoft EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the PeopleSoft EnterpriseOne format into an XML document that can be processed by PeopleSoft EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture PeopleSoft EnterpriseOne transactions and provide notification to third-party software, end users, and other PeopleSoft systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-PeopleSoft EnterpriseOne information can be stored and then processed into PeopleSoft EnterpriseOne. Z tables also can be used to retrieve PeopleSoft EnterpriseOne data. Z tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the PeopleSoft EnterpriseOne database.

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