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PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook

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PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook
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PeopleSoft Enterprise CRM Call Center Applications Preface

This preface discusses:

- PeopleSoft Enterprise CRM application fundamentals.
- PeopleSoft Enterprise CRM call center applications.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- PeopleTools PeopleBooks.

Note. All information contained in this PeopleBook is also applicable to PeopleSoft Enterprise CRM for High Technology.

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook* provides implementation and processing information for your PeopleSoft Support and HelpDesk applications. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Getting Started"

PeopleSoft Enterprise CRM Call Center Applications

The *PeopleSoft Enterprise CRM 9.1 Call Center Applications PeopleBook* discusses five distinct applications to provide complete call center management for your internal and external customers: PeopleSoft Enterprise Support, HelpDesk (IT), HelpDesk for Human Resources, Quality Management and Change Management.

To help you take full advantage of the common foundation for these call center applications, the information in this PeopleBook encompasses all five applications. Common functionality is documented once, and differences between the applications are clearly noted.

PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

There are four parts to the *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook:*

- Correspondence management.

  This part discusses manual notifications and correspondence requests.

- Automation tools.

  This part discusses PeopleSoft CRM workflow, Active Analytics Framework (AAF), business projects, and scripts.

- Configuration tools.

  This part discusses configurable search pages, configurable toolbars, attributes, and industry-specific field labels and field values.

- Knowledge Management

  This part discusses the setup of Verity search.

- Delivered Active Analytics Framework

  This part discusses the delivered terms, trigger points, contexts, action points and policies that invoke actions based upon the evaluation of user-defined business rules.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "PeopleSoft CRM Automation and Configuration Tools Preface."

PeopleSoft CRM Services Foundation

The *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise Integrated FieldService, Order Capture, and the call center applications.

There are three parts to the *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook:*

- Solution Management.

  Solution management enables users to establish a set of predefined solutions that call center agents and field service technicians can use to resolve customer problems.

- Transaction Billing Processor Integration.

  PeopleSoft Transaction Billing Processor enables PeopleSoft FieldService, Support, and Order Capture to integrate with PeopleSoft Billing and General Ledger through the use of the PeopleSoft Enterprise Contracts architecture. The integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on-demand services.

- Environmental Systems Research Institute (ESRI) Integration.

  The integration with ESRI, a mapping software, enables users to view the location of reported cases and the location of field service activities through the Map Dashboard.

See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook.*

PeopleTools PeopleBooks

For cross-references to PeopleTools documentation, refer to the Enterprise PeopleTools 8.50 PeopleBooks.

PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.

Part 1

Getting Started

Chapter 1

Getting Started with PeopleSoft Enterprise CRM Call Center Applications

This chapter discusses

- PeopleSoft Enterprise CRM call center applications.
- PeopleSoft CRM call center business processes.
- PeopleSoft CRM call center integrations.
- PeopleSoft CRM call center applications implementation.

Note. This PeopleBook describes the PeopleSoft Customer Relationship Management (PeopleSoft CRM) call center applications: PeopleSoft Enterprise Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, Quality Management, and Change Management. Although these applications differ in ways that optimize them for their specific purposes, they all share the same basic PeopleSoft architecture.

PeopleSoft Enterprise CRM Call Center Applications Overview

PeopleSoft Enterprise CRM 9.1 call center applications provide a collaborative framework for streamlining employee help desk and customer support operations. Through a standard web browser, agents can access workforce, customer, and enterprise information. When employees or customers use the PeopleSoft employee or customer portal with PeopleSoft Enterprise CRM self-services applications, they can access information that can help them solve their problems online without intervention from an agent.

PeopleSoft Enterprise CRM offers six distinct applications to provide complete support management for your internal and external customers:

- PeopleSoft Enterprise Support enables you to manage your customer support operations.
- PeopleSoft Enterprise HelpDesk enables you to manage your workforce support operations.
- PeopleSoft Enterprise HelpDesk for Human Resources enables you to manage employee human resources inquiries and issues.
- PeopleSoft Service Center for Higher Education enables you to manage constituent and staff inquiries and issues.
- PeopleSoft Enterprise Quality Management enables you to manage information related to product defects, enhancement requests, and resolutions (fixes).

- PeopleSoft Enterprise Change Management enables you to effectively manage change requests.

Note. For PeopleSoft Support, HelpDesk and HelpDesk for Human Resources, there are two types of self-service applications: one for employees (HelpDesk) and one for customers (Support).

These applications provide complete solutions for tracking and resolving problems and change requests. Together, they provide end-to-end management of all customer and workforce support issues. Because the applications use the same technology foundation, an organization that uses more than one can leverage information technology resources and implementation processes across applications.

Each application provides functionality tailored to its unique audience. Cases are tracked based on data that is appropriate to the specific application. HelpDesk cases are tracked by employee, department, and other data relevant to internal cases. Support cases are tracked by customer, contact, and other data relevant to external customers. Analyst Service Center (Service Center for Higher Education) cases are tracked by customer contact, consumer (constituent), employee, and other data relevant to an educational institution.

PeopleSoft Enterprise CRM Call Center Business Processes

This section discusses the business processes that you can perform using PeopleSoft Enterprise CRM call center applications. We discuss these business processes in greater detail in the business process chapters in this PeopleBook. You'll find greater detail for each in the corresponding business process chapter.

Business Processes for Call Center Applications

These business processes apply to PeopleSoft Support, Service Center for Higher Education, HelpDesk and HelpDesk for Human resources. They enable you to:

- Create and manage cases, including those originating in a third-party system.
- Configure the Case page to display the information, fields, and layout specific to your support and information-gathering requirements.
- Use a skills-based assignment engine to assign cases to the agents and provider groups that are most qualified to handle the cases.
- Create and manage solution libraries, search the solution library using text searches, and search for and view defects and enhancements.
- Track both successful and unsuccessful attempts to resolve cases.
- Embed analytics to suggest next actions and provide related dialogs based on the information and responses entered for a case.
- Deploy self-service transactions that callers can use to search for solutions and to report, review, and update their own cases.
- Relate cases to each other.
- Enable chat for self-service customers.
- Manage work using structured task lists known as business projects.
- Add and track tasks.

- Use troubleshooting scripts, customer satisfaction scripts, and surveys to gather information from callers.
- Assign system access to users by role using authentication tokens.
- Invoice customers for services rendered, regardless of whether a service agreement is in place (used only for PeopleSoft Support).
- Associate service-level agreements with cases to gain insight into performance against targeted service levels and related agreements.
- Use reports and charts to analyze and manage overall call center operations.

PeopleSoft Enterprise Support Business Processes

PeopleSoft Enterprise Support enables you to:

- Access the actionable customer 360-Degree View page to see an enterprise view of any customer.
- Manage material returns.
- Generate new service orders from a case.
- Invoice customers for services rendered, regardless of whether a service agreement is in place.
- Run lead qualification (upsell and cross-sell) scripts and generate new sales leads and orders from a case.
- Relate cases to defects using PeopleSoft Enterprise Quality Management.
- Associate a task list to a case.
- Use interactive reports and charts to analyze and manage overall call center operations.

PeopleSoft Enterprise HelpDesk Business Processes

PeopleSoft Enterprise HelpDesk enables you to:

- Access the HelpDesk 360-Degree View page to see PeopleSoft Enterprise CRM-related data for any worker.
- Relate cases to defects in the PeopleSoft Enterprise Quality Management.
- Manage assets, including asset discovery and remote control tasks, with PeopleSoft HelpDesk or with third-party IT asset management applications.
- Initiate and track change requests for a worker.
- Use reports and charts to analyze and manage help desk operations.

PeopleSoft Enterprise HelpDesk for Human Resources Business Processes

PeopleSoft Enterprise HelpDesk for Human Resources enables you to:

- Access the HelpDesk for Human Resources 360-Degree View page to see a summary of relevant human resources and CRM data for any worker.
- Give agents single-click access from a case to specific transactions in the human resources system.

- Use reports and charts to analyze and manage help desk operations.

Service Center for Higher Education

PeopleSoft Enterprise Service Center for Higher Education enables you to:

- Create cases relevant to IT or support (non-IT) issues, or to create blended cases (using pre-defined display templates).
- Access the Constituent 360-Degree View page to see PeopleSoft Enterprise CRM-related data for any constituent or worker.
- Use Action Links to quickly access relevant pages in PeopleSoft Enterprise Campus Solutions.

PeopleSoft Quality Management

PeopleSoft Quality Management enables you to:

- Track reported defects and enhancement requests and keep a record of how they are resolved.
- Record defect and fix information with user-defined codes and comprehensive product descriptions.
- Move the defect through the resolution process by automating worklist assignments and notifications using workflow functionality.
- Identify and access the correct records using the search tool.

PeopleSoft Change Management

PeopleSoft Change Management enables you to:

- Manage basic change request information.
- Link cases and defects to a change.
- Link similar change requests in either a parent to child relationship or an equal relationship.
- Link impacted product groups, products, and assets to a change request.
- Manage the phases and tasks that are associated with a change request.

PeopleSoft Enterprise CRM Call Center Integrations

The PeopleSoft Enterprise CRM call center applications integrate with other PeopleSoft CRM applications and with external systems. We discuss integration considerations in the implementation chapters in this PeopleBook. Supplemental information about third-party application integrations is located on My Oracle Support.

Integration with Other PeopleSoft Enterprise CRM Applications

The PeopleSoft Enterprise CRM call center applications are part of the PeopleSoft CRM product suite. Because the call center applications reside in the same database as the other PeopleSoft CRM applications, data can move smoothly from application to application without the need for integration-specific configuration.

For example, if you license both PeopleSoft Enterprise Support and Integrated FieldService, you automatically have the ability to create service orders from within your support cases.

The use of component interfaces for this type of cross-component flow ensures the triggering of all data validation and other PeopleCode processes.

Call center applications integrate with these PeopleSoft Enterprise applications:

- Integrated FieldService.
- Sales.
- Real-Time Advisor.
- Order Capture.
- Contracts.
- Asset Management.
- Services Procurement (work order integration).
- On-Line Marketing (surveys).

Integration with External Systems

Customer, worker, product, and Analytic Calculation Engine (ACE) integrations are common to multiple PeopleSoft CRM applications. The call center applications support the following additional integration points:

- Integration with PeopleSoft Enterprise Supply Chain Management or similar systems enables you to generate return material authorizations (RMAs) in PeopleSoft Support for customers returning stock for replacement or repair or for orders that were shipped in error.
- The Credit Card enterprise integration point (EIP) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support.
- Real-time EIPs for HelpDesk for Human Resources enable you to view relevant human resources data (from PeopleSoft Enterprise Human Capital Management or Oracle E-Business Human Resources) while using the security that is already established in the human resources system to control access to the data.

  To protect sensitive data, the information is not stored in the PeopleSoft CRM system.
- Real-time EIPs for Service Center for Higher Education enable you to view constituent data from PeopleSoft Enterprise Campus Solutions.

- The Worker EIP synchronizes worker information with other systems.

  When you implement the Worker EIP, the system publishes application messages when users add or modify worker records in PeopleSoft CRM. You can also set up PeopleSoft CRM to subscribe to Worker EIP application messages that are published when users modify these records in other systems. The Worker EIP gives PeopleSoft CRM the ability to accept and create future-dated workers that were created in other systems and subscribed to by PeopleSoft CRM.

- Through the Case EIP, third-party IT asset management applications can launch IT asset discovery and desktop remote control from PeopleSoft HelpDesk.

  Note. You can launch IT asset discovery and desktop remote control without the case EIP. Using the IT Asset Management Integration with your third-party discovery and remote control software, an agent can perform administrative and diagnostic functions from the Case page.

- The Systems Management integration framework provides a mechanism for integrating third-party network management applications.

- Integration with PeopleSoft Enterprise Contracts or any third-party billing application enables the invoicing of agreement-based service orders as they are generated during a support call.

- Integrations with PeopleSoft Service Procurement and Maintenance Management enable users to create work orders in PeopleSoft Financials.

- Service Oriented Architecture (SOA)

  SOA has emerged as a standard form of integration. To lower customer costs and provide interoperability, PeopleSoft has made certain transactions available through SOA. PeopleTools has converting existing Integration Broker messages to web services. These web services have specific PeopleSoft structures. Part of this feature includes the delivering of more generic web services that could be used with other CRM systems.

  This feature provides web services for existing Case functionality so that any business process can call the web service and leverage the features. To support business processes for the Case component, PeopleSoft has built these web services and operations:

Operations	***Message Type***	***Description***
Create Case	Synchronous	User sends specific information through a request message. The return message includes the case ID when the operation is successful. If the message fails, the system displays an error message.
Update a Case	Synchronous	User sends specific information, including the Case ID, and user information, through a request message. The return message includes the Case ID when the operation is successful. If the message fails, the system displays an error message.
Get Case	Synchronous	This operation requires a case ID. The return message includes case information.
Search Case	Synchronous	User sends specific search criteria information through a request message. This operation returns a list of cases the meet all the given criteria.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Managing Enterprise Integration for PeopleSoft Enterprise CRM," EIPs in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Understanding Business Object Relationship Model Components"

PeopleSoft Enterprise Call Center Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Enterprise call center applications also provide component interfaces to help you load data from your existing system into Call Center tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists some of the components that have component interfaces:

Component	***Component Interface***	***References***
RC_CASE_TYPE	RC_CASE_TYPE_CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RC_PRIORITY	RC_PRIORITY_CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RC_PROBTYPE	RC_PROBTYPE_CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RC_SEVERITY	RC_SEVERITY_CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RC_STATUS	RC_STATUS _CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RC_QUICK_CODE	RC_QUICK_CODE _CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RBT_TGUIDE_SETUP	RBT_TGUIDE_SETUP_SCI	See Chapter 20, "Configuring Self-Service Applications," Configuring Troubleshooting Guide, page 482.
RC_SOLN_LIB_SETUP	RC_SOLN_LIB_SETUP_SCI	See Chapter 20, "Configuring Self-Service Applications," Configuring Troubleshooting Guide, page 482.
RC_CTD_DEFINE	RC_CTD_DEFINE _CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.
RC_CTD_COMBINE	RC_CTD_COMBINE_CI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface"

Enterprise PeopleTools 8.50 PeopleBook: Setup Manager

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Component Interfaces

Part 2

Setup Data

Chapter 2

Defining Call Center Business Units and Display Template Options

This chapter provides overviews of call center business units, display templates, and assignment options and discusses how to:

- Define call center business units.
- Define display template general options for PeopleSoft Call Center.
- Manage policies using case display template actions.

Understanding Call Center Business Units

A call center business unit represents an operational entity, an individual call center within your organization. You must associate all call center cases with a business unit. All call center reporting and analysis is based on business units. You can configure different business units for different business processes.

You can use one business unit for all cases, or you can separate operations based on whatever criteria makes the most sense. For example, you could create business units for different product lines or regions.

Before creating multiple call center business units, be sure that you understand the concept of *tableset controls*, the mechanism that is used to determine valid values for certain fields on the Case page and other transactional pages.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Business Units and TableSet Controls," Understanding TableSet Controls in PeopleSoft Enterprise CRM.

Understanding Display Templates

This section discusses:

- Appearance and behavior control.
- Display template families.
- Active Analytics Framework (AAF) policies and display templates.
- Defaulting logic.
- Delivered display templates for call center applications.

Appearance and Behavior Control

Display templates enable you to control the appearance and behavior of the Case component (RC_CASE) for a variety of specific business needs. You can associate the Case component with multiple display templates, each of which provides a different presentation of the component tailored for your specific needs.

The PeopleSoft CRM Call Center application delivers the Case component with multiple templates. You can, however, create new display templates or modify existing ones. You can also automatically change display templates on the pages within the Case component based on certain case criteria using AAF policies. Additionally, agents can manually change their views of cases using different display templates.

For example, suppose that you are using the three delivered display templates for the Case component in your call center operation: Customer Support Center, Internal IT HelpDesk, and Internal Human Resources HelpDesk. You can configure how the component looks and behaves in each operation based upon your business requirements.

You may also want to disable the Related Cases page for the two help desk display templates, change the Customer Information section label to *Employee Information* for the help desk display templates, disable the Dispute Information section in display templates that are not pertinent to the communications industry, and so on.

Use display templates to control:

- Visibility of pages. (You cannot change the order of the pages.)
- Visibility of page sections. (You cannot change the order of the sections.)
- Visibility and security of page fields.
- Functionality and setup options that are initiated by display templates.
- Default pages that appear when users access the component in the add or update mode.
- Most labels on fields, sections, and tabs within sections.

Note. From the Display Template Details component, you can change labels for a section, field, or embedded tabs without first creating a message catalog definition. The system automatically creates the message or label behind the scenes.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Display Template Families

You can categorize display templates into families. Once an agent opens a case, however, the agent cannot change the display template family. Depending on how you configure your system, an agent can use different display templates to view information for the same case.

Use the Display Template Family component (RDT_TMPL_FAMILY) to specify which display templates and components are assigned to the display template family.

The PeopleSoft system delivers a number of display template families for its call center applications. You cannot, however, add new display template families. You can add and create new display templates and assign them to an existing display template family. You can also change the description of a display template family.

To clone an existing display template and assign it to a display template family, use the Display Template Save As page.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Display Templates"

AAF Policies and Display Templates

To render case information using a specific display template based on predetermined AAF policy conditions, you can create new AAF policies using the *Case Display Template* action.

You can associate these trigger points with the *Case Display Template* action for agent-facing Case components:

- After a HelpDesk Case is Saved.
- After a Support Case is Saved.
- When a Business Unit is Selected for HelpDesk Case.
- When a Business Unit is Selected for Support Case.
- When a Case Type is Selected for HelpDesk Case.
- When a Case Type is Selected for Support Case.
- When a Category is Selected for HelpDesk Case.
- When a Category is Selected for Support Case.
- When a HelpDesk Case is Presented.
- When a New Self-Service HelpDesk Case is Presented.
- When a New Self-Service Support Case is Presented.
- When a Product Group is Selected for HelpDesk Case.
- When a Product Group is Selected for Support Case.
- When a Product is selected for a HelpDesk Case.
- When a Product is Selected for Support Case.
- When a Support Case is Presented.
- When an Existing Self-Service HelpDesk Case is Presented.

- When an Existing Self-Service Support Case is Presented.

You can associate these trigger points with the *Case Display Template*action for both self-service Case components:

- When a New Self-Service Support Case Business Unit is Selected.
- When a New Self-Service HelpDesk Case Business Unit is Selected.

Additionally, you can use the Manage Policies by Case Display Template Action search page to locate all the policies that use the Case Display Template action.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Defaulting Logic

The system uses defaulting logic to determine which display templates and display template families to use when an agent opens a new case. This section discusses these three types of defaulting logic:

- Display template family.
- Business unit.
- Display template ID.

Display Template Family Defaulting Logic

The display template family defaulting logic uses content references (CREFs) to determine which display template family to use when an agent opens a new case. The system typically gets the display template family directly from the CREF that is associated with the link in the left-hand navigation.

This logic is only used to add a new case. When updating an existing case, the system retrieves the display template family information from the existing Case record.

If the display template family is not available in the CREF, the system looks for the display template ID in the CREF. If it is not there, the system displays an error message.

If the display template ID is in the CREF, the system gets the display template family from the display template ID. To locate this information, the system looks at the display template family setup pages for the display template family that is associated with the component.

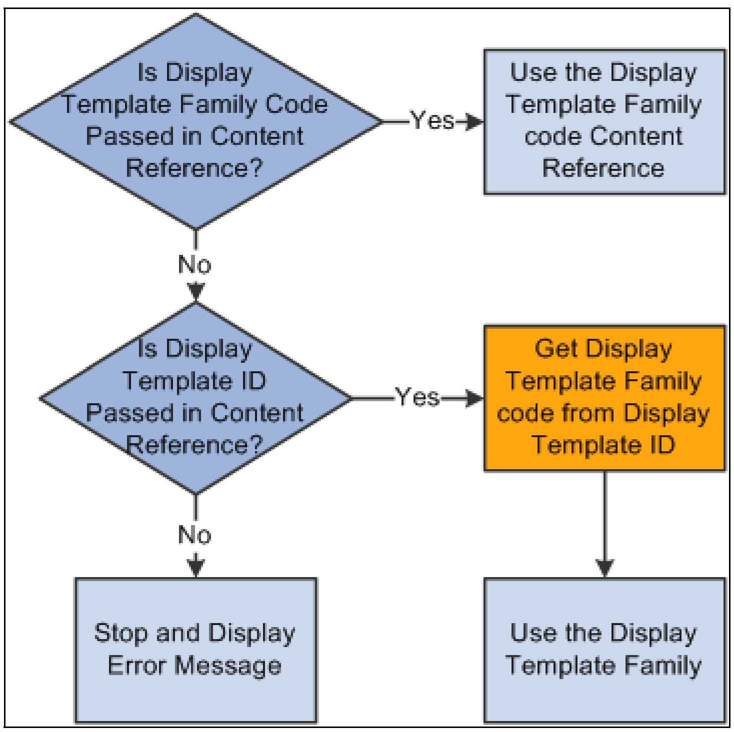
The PeopleSoft system delivers these display template family codes for the following call center applications and industries:

Application	*Industry*	*Display Template Family Code*
Support	Core Support	RC_SUPPORT
Support	Communications	CRM_COM

Application	***Industry***	***Display Template Family Code***
Support	Energy	CRM_ENG
Support	Financials	CRM_FIN
Support	Government	CRM_GOV
Support	Higher Education	CRM_HE
Support	Insurance	CRM_INS
HR HelpDesk	Core HR HelpDesk	CRM_HHD
HelpDesk	Core HelpDesk	RC_HELPDESK

Note. You cannot change the display template families that are associated with the CREF. You can, however, add as many display templates as you need to the display template family.

This flowchart shows how the system uses content references to locate the correct display template family when it creates a new case:



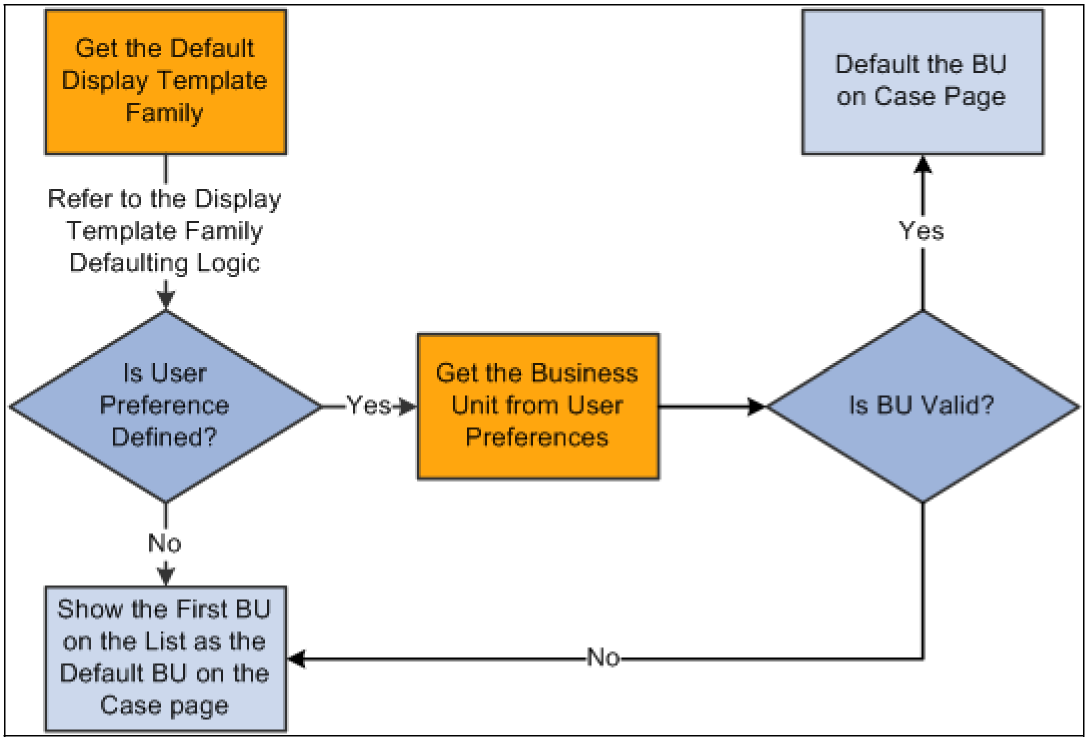
Display template family defaulting logic

Business Unit Defaulting Logic

If you set up the User Preferences - Call Center page with display template, component, and business unit information, the system gets the business unit from the User Preferences page.

If the default business unit is not valid, the system uses the first business unit and display template ID in the list on the Case page for the Business Unit field. If an agent changes the business unit that the user has access to while on the Case page, the system looks at the Display Template page within the Call Center Business Unit Definition component to display the correct display template family.

This flowchart shows how the system uses the information on the User Preferences - Call Center page to locate the correct display template family to use when an agent is creating a new case:



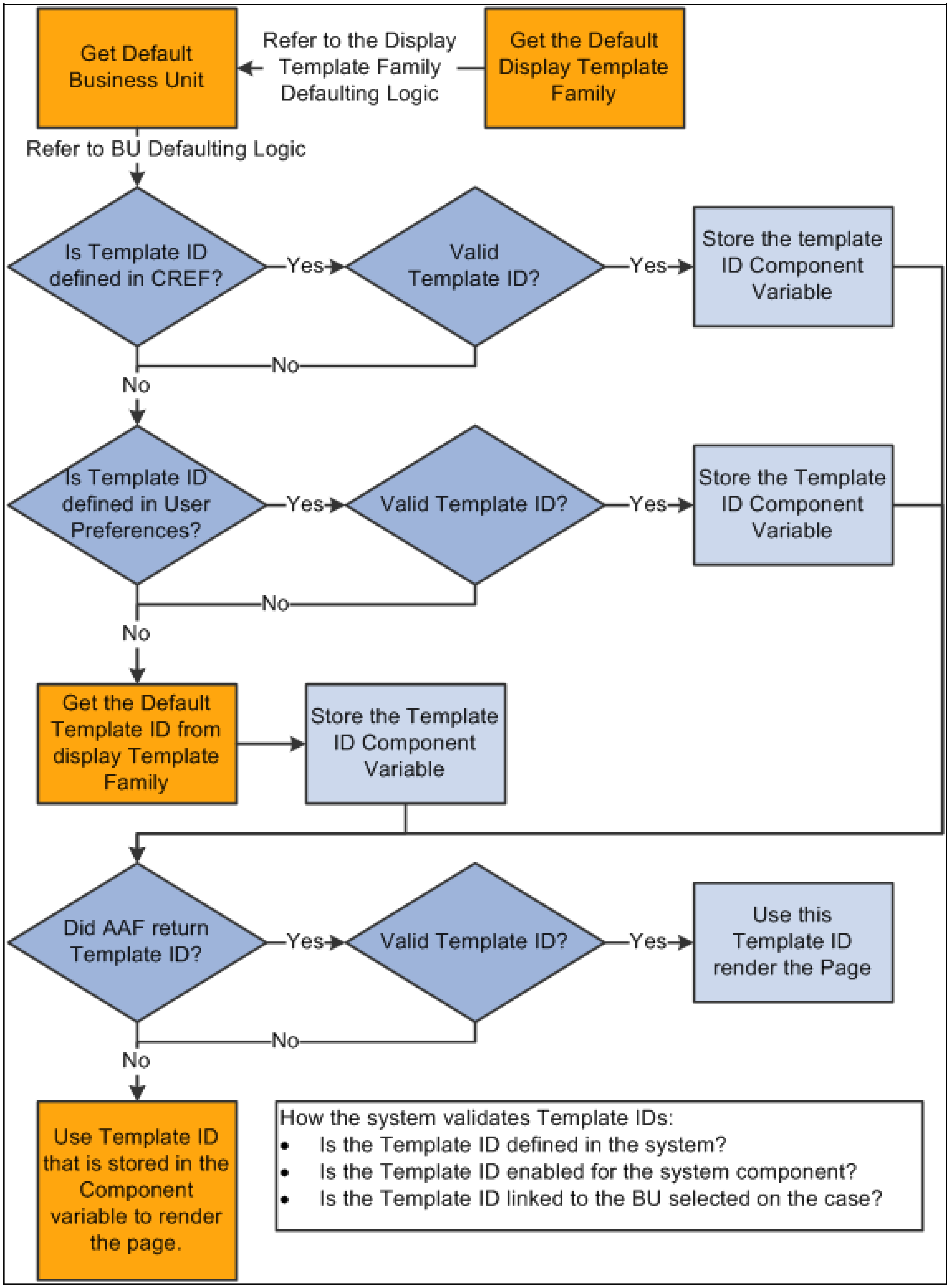
Business unit defaulting logic

Display Template ID Defaulting Logic

The system can locate the display template ID and display it on a new case in one of four ways:

- From a CREF.
- From user preferences.
- From the display template family setup.
- Using AAF policies.

If you set up AAF policies using an action called Case Display Template, the system uses defaulting logic to find the correct display template ID to display on a case based on certain conditions contained within the policy. This flowchart shows the defaulting logic that the system uses:



Display template ID defaulting logic

Note. When implementing the integration of HelpDesk to PeopleSoft or E-Business Human Resources, it is important that users have the appropriate display template ID specified in their user preferences. As delivered, the CREF's for Add Case and Search Case point to a display template family, so the user preference is checked to determine the correct display template ID to use for a case.

As delivered, the correct display template ID to list in user preferences to open a PeopleSoft HR HelpDesk Case from the left hand navigation is *CRM_HHD.* The delivered display template ID to be specified to open an E-Business HR HelpDesk Case from the left hand navigation is *CRM_HHD_EBS.*

Delivered Display Templates for Call Center Applications

This table lists system-delivered display templates for call center components:

Component Name	***Display Template ID***
RC_AGT_CASES_PGT	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_HE (Higher Education)
	CRM_HE_IT (Higher Education - IT)
	CRM_HE_SUPPORT (Higher Education - Support)
	CRM_HHD (HR HelpDesk)
	CRM_INS (Insurance)
	RC_HELPDESK (HelpDesk)
	RC_SUPPORT (Support)
RC_CASE	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_HE (Higher Education)
	CRM_HE_SUPPORT (Higher Education - Support)
	CRM_HE_IT (Higher Education - IT)

Component Name	***Display Template ID***
	CRM_HHD (HR HelpDesk)
	CRM_HHD_EBS (CRM HelpDesk E-Business Suite)
	CRM_INS (Insurance)
	RC_HELPDESK (HelpDesk)
	RC_SUPPORT (Support)
RC_CASE_HD_SS	CRM_HE (Higher Education)
	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_CASE_HD_SS_RPT	CRM_HE (Higher Education)
	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_CASE_HD_SS_SRCH	CRM_HE (Higher Education)
	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_CASE_SEARCH	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_HE (Higher Education)
	CRM_HE_IT (Higher Education - IT)
	CRM_HE_SUPPORT (Higher Education - Support)
	CRM_HHD (HR HelpDesk)
	CRM_INS (Insurance)
	RC_HELPDESK (HelpDesk)
	RC_SUPPORT (Support)

Component Name	***Display Template ID***
RC_CASE_SW_SS	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_CASE_SW_SS_RPT	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_CASE_SW_SS_SRCH	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_SOLNSRCH_HD_SS	CRM_HE (Higher Education)
	CRM_HHD (HR HelpDesk)
	CRM_HE (Higher Education)
	RC_HELPDESK (HelpDesk)
RC_SOLNSRCH_SW_SS	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)

Component Name	***Display Template ID***
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_SS_HD	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_SS_HE	CRM_HE (Higher Education)
RC_SS_SW	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)

Important! PeopleSoft CRM delivers system data for each component that supports display templates. Stored in the Display Template System Data component, the system data dictates which parts of the component that functional users are able to control using the predefined display templates (display templates are defined in the Display Template Definition component). Access to these two components is restricted to IT administrators only. You can change this information if you need to. PeopleSoft considered these types of changes a configuration rather than a customization. You cannot, however create new families, just new templates within the delivered families.

Understanding Assignment Options

The Options page has two sections: Agent and Self-service. Each section has options for provider group assignment and for agent assignment.

Note. In addition to the options, you can automatically assign self-service cases to a provider group (but not to an agent) by specifying a default provider group on the Case Defaults page. However, auto-assignment settings on this page take precedence: the system will first attempt to assign cases based on the settings on the Business Unit - Options page. Only if that attempt fails does the system assign the case to the default Assign To provider group that is specified on the Case Defaults page.

This section discusses:

- Provider group assignment.

- Person assignment.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook,* "Setting Up and Maintaining Provider Groups and Group Members."

Provider Group Assignment

The following definitions describe options for automatically assigning new cases to provider groups. These settings apply only when the Provider Group field or the Assigned To field is blank in a newly submitted case**—**the system does not override an existing value in the Provider Group field. For example, if you use a Quick Code to assign a provider group, the system does not attempt to assign a provider group when you save.

None

Select *None* if you do not want any automatic assignment to occur; assignments must be made manually.

Note. Delivered AAF policies for cases send notifications to the agent or provider group that is assigned to a newly created case. If you allow unassigned cases to be saved, you should define a mechanism for routing and handling these cases.

Any

Select *Any* or *Available* to invoke the assignment engine when the case is saved.

If you select *Any,* the assignment engine finds the worker or provider group with the highest overall fit score.

Note. If a user manually assigns an agent to the case and the agent is in exactly one provider group, the system automatically assigns the agent's provider group to the case when it is saved. If the agent is in more than one provider group, the system leaves the Provider Group field blank on the Case page when the case is saved. You could, however, have a provider group that is available and none of the workers are available.

Available

Select *Any* or *Available* to invoke the assignment engine when the case is saved.

If you select *Available,* the assignment engine looks only at provider groups that are currently available according to the schedules you create.

Default

Select *Default* to assign a case to its creator. This value does not invoke the assignment engine.

If you select *Default,* the system will address whether an agent is on the case. If an agent is on the case and that agent is in only one provider group, the system assigns that provider group as the *Default* provider group. Otherwise, the system leaves the Provider Group field blank.

Selecting *Default* forces the system to find the group for the agent that has already been selected. If the agent is a member of more than one group, the system leaves the Provider Group blank.

Note. This option is available only for cases created by agents, not for cases created by self-service application users. However, you can set up a self-service provider group on the Case Defaults page using the Assigned to Provider Group field for self-service call center components.

Person Assignment

The following definitions describe options for automatically assigning new cases to individual agents. These settings apply only when the Assigned To field is blank in a newly submitted case; the system does not override an existing value in the Assigned To field. For example, if you use a Quick Code to assign an agent, then the system does not attempt to assign a different agent when you save the case.

Note. The system always assigns a provider group first, and then an agent.

None

Indicates that the system does not assign new cases to agents.

Note. Be aware that delivered AAF policies for cases send notifications to the agent or provider group that is assigned to a newly created case. If you allow agents to save unassigned cases, you should define a mechanism for routing and handling those cases.

Any

Select to have the assignment engine assign the case to the person with the highest fit score (if a provider group was previously entered, either manually or through auto-assignment). If the system did not assign a provider group, then it does not assign an agent either.

Available

Select to have the assignment engine check worker schedules and assign cases only to agents who are available at the time the case is assigned.

Note. The *Any* and *Available* options use the assignment engine. For the assignment engine to assign an agent, a provider group must already be assigned.

Default

Select to have the system assign the case to the agent who created the case.

This setting only applies if the case is new. If you update an existing case and clear the Assigned To field, the system leaves it blank. This functionality is true for the other assignment options as well. If you want to run the assignment engine after the initial creation of the case, you need to use the Suggest a Provider Group and Suggest an Agent buttons next to the fields.

The system handles case assignments according to these rules:

- If a provider group is specified, either manually or through auto-assignment, the system does not assign the case to an agent.
- If no provider group is specified, the system assigns the case to the agent who created the case.
- If the provider group auto-assignment option is also Default, then the system assigns the case to the agent's provider group (assuming that one can be uniquely identified).

Note. This option is for cases created by agents. For cases created through a self-service application, you can set up a default provider group on the Case Defaults page that you can use for self-service. The system will assign a provider group, but it will not assign an agent.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches."

Defining Call Center Business Units

To define call center business units, use the Call Center Definition (RC_BUS_UNIT) component.

This section lists prerequisites and discusses how to:

- Create a call center business unit.
- Define business rules for a call center business unit.
- View case match rules.
- Set up display templates.
- Set up case defaults.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Prerequisites

Before you can associate a call center business unit with a default business unit in PeopleSoft Enterprise FieldService, Inventory, Quality Management, or Sales, you must first create business units for the specific application.

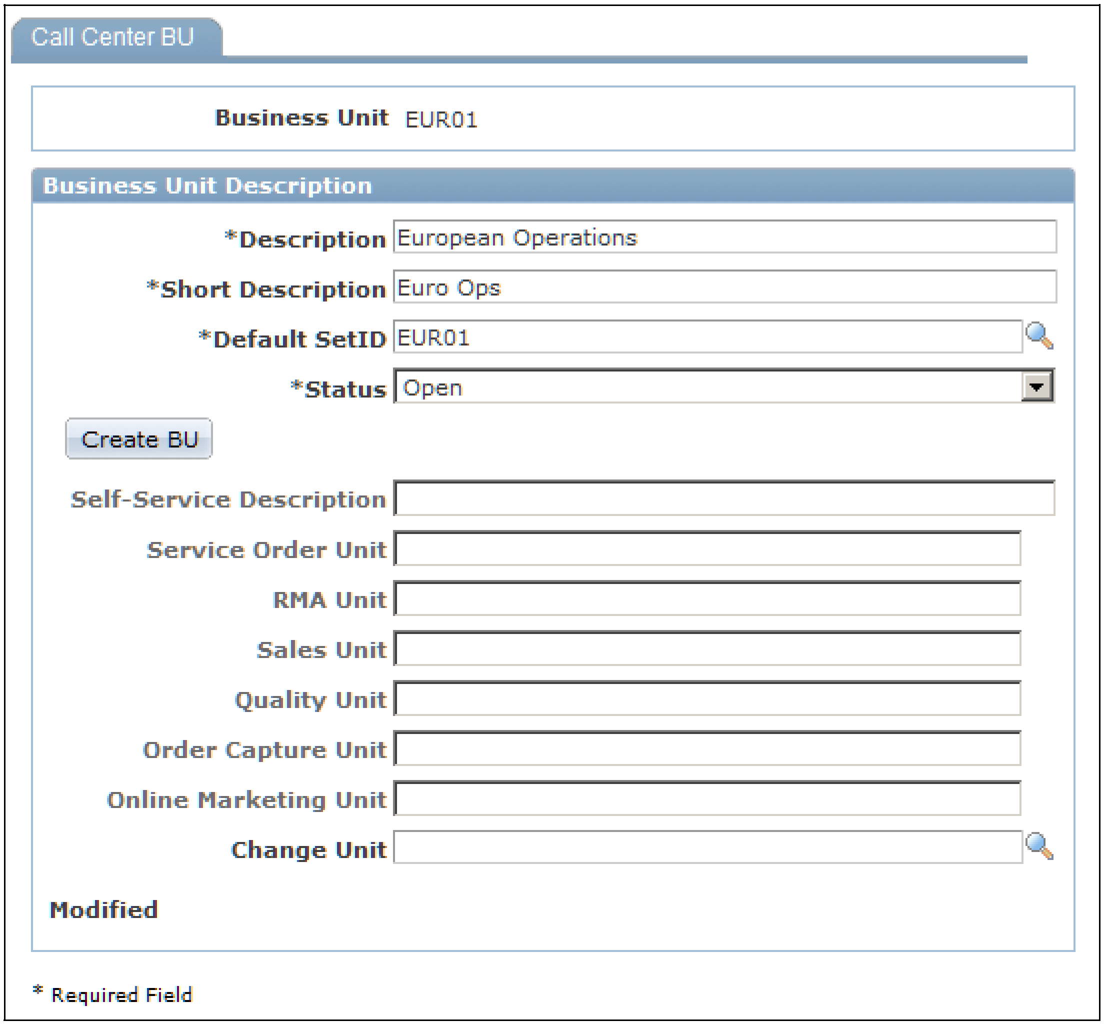
You may also want to do some other setup tasks, such as creating case statuses, provider groups, category/type/details, and so on.

Pages Used to Define Call Center Business Units

Page Name	***Definition Name***	***Navigation***	***Usage***
Call Center BU	BUS_UNIT_RC1	Set Up CRM, Business Unit Related, Call Center Definition, Call Center BU	Create call center business units and establish default business units to use when integrating with other PeopleSoft applications.
Business Unit - Options	BUS_UNIT_RC2	Set Up CRM, Business Unit Related, Call Center Definition, Options	Define business rules for a call center business unit.
Match Usage	RC_MATCH_SUMMARY	Click the Match Usage link on the Business unit - Options page.	View the case matching criteria defined for this business unit and associated SetID.
Business Unit - Display Templates	BUS_UNIT_RC_RDT	Set Up CRM, Business Unit Related, Call Center Definition, Display Templates	Associate display template families and display templates with the business unit.
Case Defaults	BUS_UNIT_RC_DEF	Set Up CRM, Business Unit Related, Call Center Definition, Case Defaults	Set up defaults for all call center applications.

Creating a Call Center Business Unit

Access the Call Center BU page (Set Up CRM, Business Unit Related, Call Center Definition, Call Center BU).



Call Center BU page

The preceding page is shown in the Add a New Business Unit mode. In Add mode, the system hides the other pages in the component and many fields are not available for entry.

Business Unit Displays the business unit identifier you entered when you first accessed the page. To maximize system performance, always use exactly five characters.

Business Unit Description

Description Enter the description that you want to appear on the Case page and other places where the business unit appears.

Default SetID

The Default SetID field appears only when you open the Call Center BU page in Add mode. Once you create the business unit, the system sets up default tableset control information, and you must use the TableSet Control page to change the default.

Enter or select the default setID for the business unit. When you create a business unit, the system copies the setID for each record group from the tableset control of the setID you have entered. In the tableset control record, each of the delivered record groups is associated with the setID that you enter here or a setID that is being shared (SHARE) with other setIDs.

Note. The system will always create a setID that is equal to the business unit that you create. Every business unit is also a setID.

Status

Indicates the call center status. Values are: *Open* (active) or *Closed* (inactive). The system does not process transactions for closed business units.

Note. You cannot create a new case for a closed business unit, but you can continue working a case that has already been created with a business unit that was closed after the case was opened.

Create BU (create business unit)

This button appears only when you open the Call Center BU page in Add a New Business Unit mode.

Click to establish the tableset controls for the call center business unit based on the default setID that you specify.

Other pages in the component and many of the fields on this page are unavailable until you click the Create BU button to create the business unit.

The following fields are not available until you click the Create BU button. Use these fields to specify default business units to use when creating certain types of objects from the Related Actions section on the Case page, the Related Actions section on the Case Summary page, or from the Related Actions page within the Case component.

These fields are relevant only if you integrate with the specified product. Agents can override the defaults that are established here.

Self-Service Description

Enter a description for self-service application users. This description should be meaningful to users who are unfamiliar with the organization of your call center business unit.

Service Order Unit

Enter the default FieldService business unit to use when creating service orders from call center cases. When you establish tableset sharing, ensure that the field service business unit and the call center business unit prompt against the same set of customers.

RMA Unit (return material authorization unit)

Enter the default RMA business unit to use when creating a return material authorization from a case.

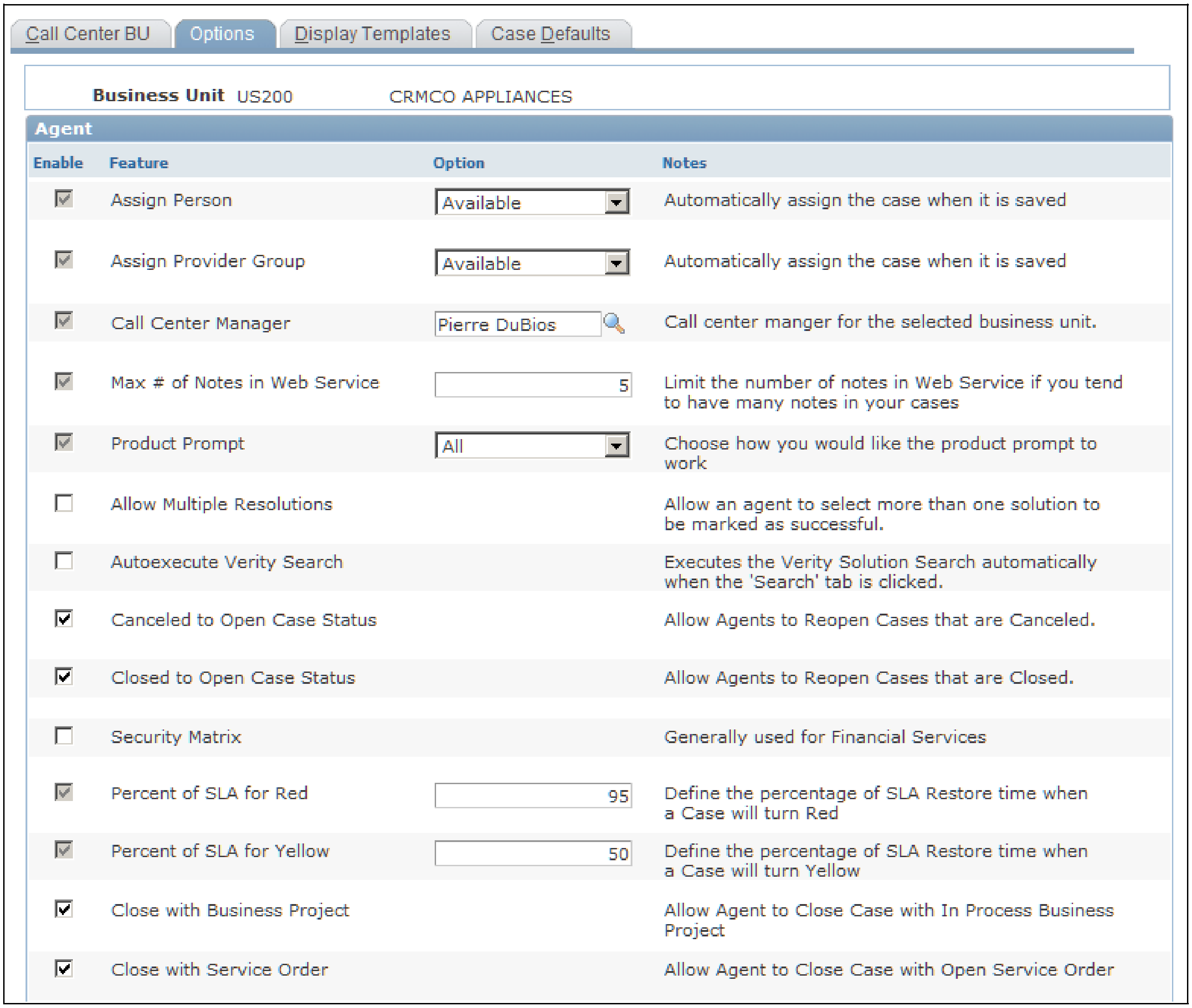
Sales Unit	Enter the default Sales business unit to use when creating a sales lead from the Related Actions page in a call center case. When you establish tableset sharing, make sure that the sales business unit and the call center business unit prompt against the same set of customers.
Quality Unit	Enter the default Quality Management business unit to use when creating or relating a defect to a case. You can create a new defect or relate an existing defect. In either case, the system displays the business unit that you enter here on the page.
Order Capture Unit	Enter the default Order Capture business unit to use when entering an order related to a case.

Note. If you use a lead qualification script to transfer to Order Capture from either the Support or HelpDesk case component, the business unit must be valid for your Order Capture application or you must select a default order capture business unit on this setup page.

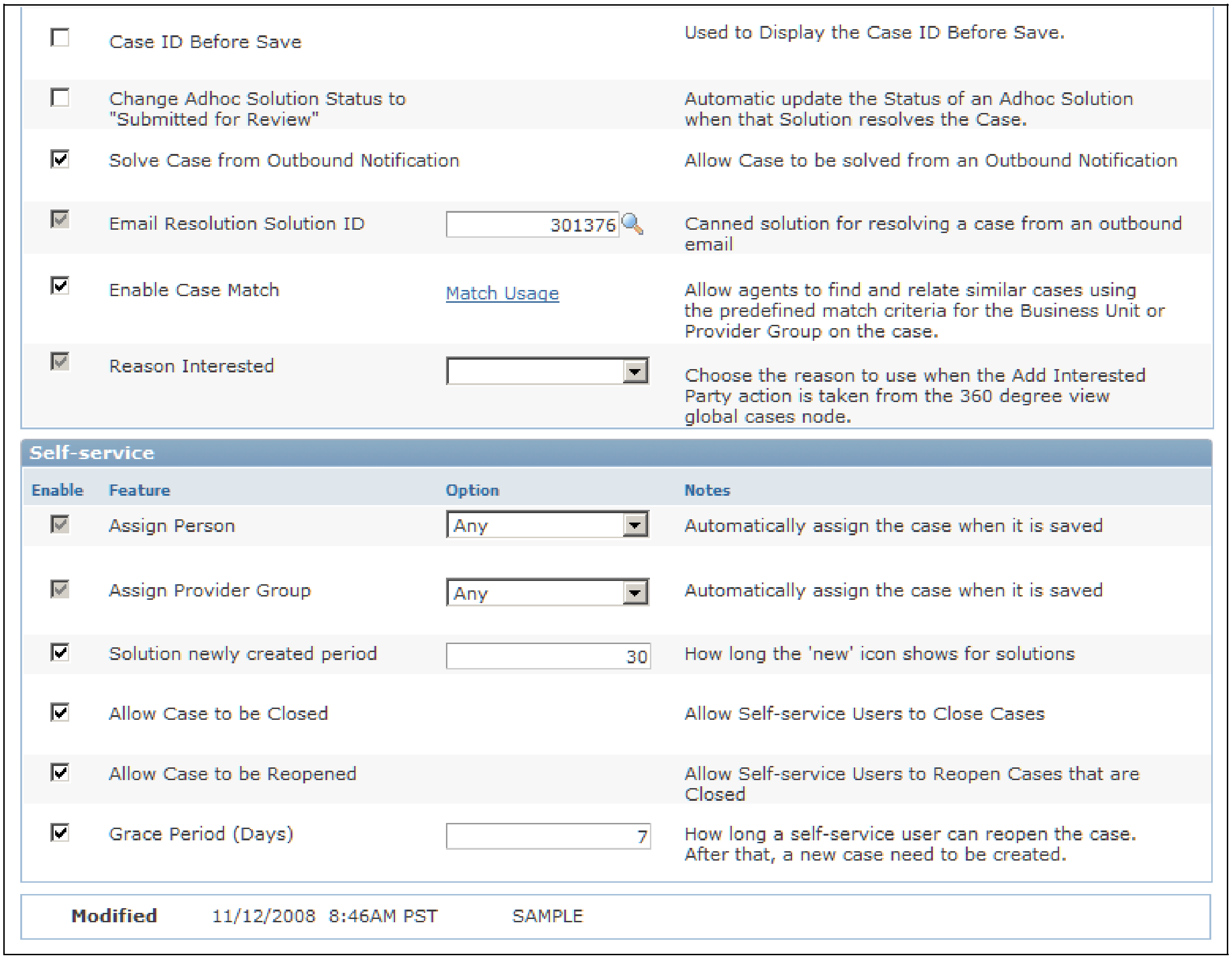
Online Marketing Unit	Select the online marketing business unit that you want the system to use by default in the Dialog Business Unit field when a user selects the *Case Survey* related action to launch a customer survey from the Case page.

Defining Business Rules for a Call Center Business Unit

Access the Business Unit - Options page (Set Up CRM, Business Unit Related, Call Center Definition, Options).



Business Unit - Options page (1 of 2)



Business Unit - Options page (2 of 2)

The fields on this page are not available for entry until you create the business unit by clicking the Create BU button on the Call Center BU page.

Agent

Assign Person

Select the option that you want the system to use to automatically assign new cases to individual agents.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Person Assignment, page 27.

Assign Provider Group

Select the option that you want the system to use to automatically assign provider groups to new cases.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Person Assignment, page 27.

Call Center Manager

Select your default call center manager. You can use the selection here to route workflow using AAF notifications.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow."

Max # of Notes in Web Service

If you tend to have many notes in your cases, enter a number that limits the volume of notes that you want included in a web service. If you leave this field blank, the system includes all notes.

Product Prompt

Select how you want the product prompt to work. The options are:

- *All*

  You can select a product from the master products table.

- *FSI*

  If you have FSI installed, you can select an FSI-related product from the master FSI products table.

- *Installed*

  You can select from a list of products that are installed at a specific site.

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products.

Allow Multiple Resolutions

Select if you want to allow an agent to select more than one solution to be marked as *Successful.*

Autoexecute Verity Search

Select if you want the Verity search to automatically execute when the Search page is accessed.

Canceled to Open Case Status

Select to allow agents to reopen cases that are in a canceled status.

Closed to Open Case Status

Select to allow agents to reopen cases that are closed.

Bill for Cases

Select if you are using the billing functionality for support cases. Select the Details link to enter price by currency and rate type information.

Note. This field appears only if you selected the Send Billing Transactions to Contracts and Calculate Price on Case check boxes on the Installation Options - Billing and Pricing Options page.

Security Matrix	This field controls who sees data in the Financial Account field on the FSI Case page. Use the Security Matrix setup page (select Set Up CRM, Security, Financial Services, Security Matrix) to establish a hierarchy (or matrix) of people who can access a specific financial account. When you select this check box, only those people in the matrix can see the account numbers in the account prompt. If you do not select this check box, the agent cannot complete a transaction for the particular financial account or business contact for the customer. Also, the account owner cannot complete the transaction without the security matrix permission created for the financial account or business contact on the specified transaction. On the Case page for PeopleSoft Support, the security matrix controls the display of financial accounts in the customer information section. If any consumer or contact that is used on the case has transactions permission, you can select or view the security matrix and their financial accounts. You can control the Billing Account display using the FSI Options page (select Set Up CRM, Product Related, Financial Services, FSI Options). Using display templates, you can enable or disable the display of the Financial Account fields. **Note.** Billing accounts and financial accounts are related to each other. If a billing account is associated with one or more financial accounts, the system displays the financial accounts associated with the billing account when you select it on the Case page. See *PeopleSoft Enterprise CRM 9.1 Industry Application Fundamentals PeopleBook*, "Working with Financial Accounts," Understanding Financial Accounts.
Percent of SLA for Red (percent of service level agreement for red)	Enter a number to indicate the percentage of SLA (Service Level Agreement) restore time that needs to pass before the system turns the case to red. For example, enter 90 (enter a whole number, not a decimal amount) if you want a case to turn red when it has reached 90 percent of the SLA restore time. In addition, this calculation takes into account the time the case is on hold.
Percent of SLA for Yellow percent of Service Level Agreement for yellow)	Enter a number to indicate the percentage of SLA restore time that needs to pass before the system turns the case to yellow. The number you enter in this field must be lower than the red number or you will receive an error message. As such, a case should turn yellow before it turns red. These fields will accept numbers between 1 and 999. Do not enter decimal amounts.
Close with Business Project	Select to allow agents to close cases with business projects that are at the *In Process* status.
Close with Service Order	Select to allow agents to close cases that have an open service order.
Case ID Before Save	Select to generate a case ID when the agent first opens the case.
Change Adhoc Solution Status to "Submitted for Review"	Select to automatically update the status of an ad hoc solution to *Submitted for Review* when a solution resolves a case.

Solve Case from Outbound Notification

Select to allow cases of this business unit to be resolvable when outbound notifications are sent.

This option is selected by default. When selected, the Send and Solve toolbar button appears on the Outbound Notification page if the initiating transaction is case. You can click this button for the system to perform these tasks:

- Deliver the drafted notification to recipients.
- Solve the associated case by attaching a predefined canned solution (the specified email resolution solution ID) to the case and setting the case status to the resolved case status as specified on the Case Defaults page.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Sending Manual Notifications," Sending Manual Notifications From CRM Transactions.

Email Resolution Solution ID

Select to specify a solution that attaches to cases when users click the Send and Solve button on the Outbound Notification page. Solutions meeting these criteria are available for selection:

- Solutions are of type *Canned Solution.*
- Solutions are active.
- Solutions belong to the setID that is associated with the call center business unit.

When the system resolves a case from an outbound notification, it attaches a solution to the case with a solution status of *Successful Resolution* and then sets the status of the case to the predefined resolved case status. As a result, the system also increases the usage count of the canned solution by one as well.

Note. If you access the Outbound Notification page by clicking the Email button to email a solution and click the Send and Solve button, the selected solution is then used to attach to the related case as the successful resolution. The canned solution does not apply when a solution is already selected.

This option is selected automatically if the Solve Case from Outbound Notification option is selected. Make sure to specify an email resolution solution; otherwise, an error message appears if you click the Send and Solve button but no canned solution is available to attach and resolve the case. In this case, the system sends the notification but it does not resolve the case.

Enable Case Match

Select this to enable case matching for this Business Unit. Case matching enables you to instruct the system to find cases that are similar to the case you are presently viewing. This provides a quick way to check if the issue from the current case you are viewing has already been reported in or is related to another case.

Note. The rules for defining case matches are defined on the Match Detail page, and can be viewed using the Match Usage link on the Options page for Call Center Business Unit defaults.

Match Usage	Click this link to view the match usage criteria that have been defined for this business unit and associated SetID on the Match Detail page.
Reason Interested	Specify the reason to be associated with the entry for interested party on a case when the Add Interested Party action is taken from the 360-Degree View global cases node.

Self-Service Options

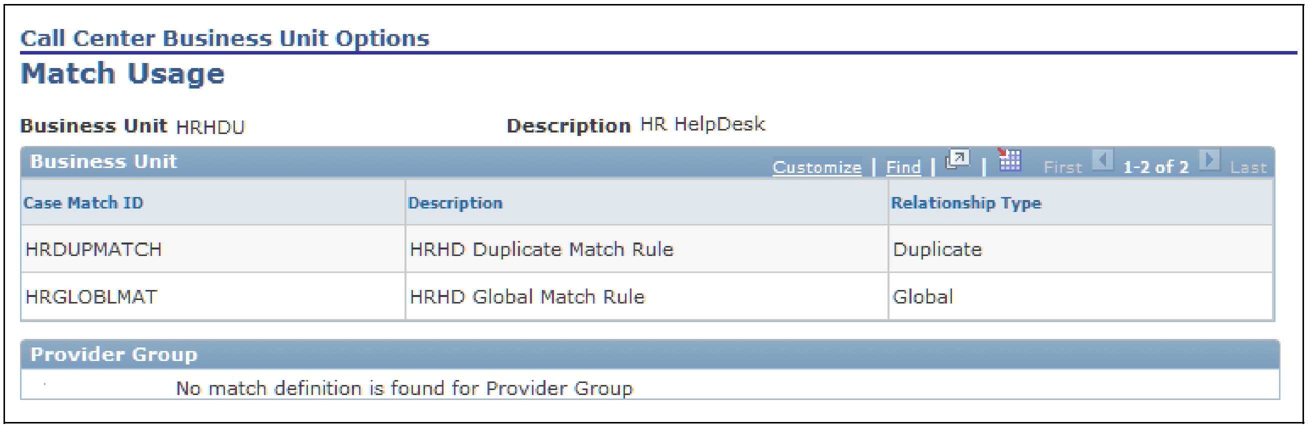
Assign Person	Select the option that you want the system to use to automatically assign self-service cases to individual agents. See Chapter 2, "Defining Call Center Business Units and Display Template Options," Person Assignment, page 27.
Assign Provider Group	Select the option that you want the system to use to automatically assign provider groups to new cases. See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Maintaining Provider Groups and Group Members."
Solution Newly Created Period	Specify how long (in days) the *new* icon should appear for solutions.
Allow Case to be Closed	Select to allow self-service application users to close cases.
Allow Case to be Reopened	Select to allow self-service application users to reopen cases that are closed.
Grace Period (Days)	Enter the number of days after a case has been closed during which self-service application users are permitted to reopen the case. This option is only allowed if you select the previous option—allowing a case to be reopened. If you allow cases to be reopened, the grace period will default to *7* days.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls," Understanding TableSet Controls in PeopleSoft Enterprise CRM

Viewing Case Match Usage

Access the Match Usage page (click the Match Usage link from the Business Unit - Options page).



Match Usage page

Use this page to view the case match options defined for the business unit and any applicable provider groups.

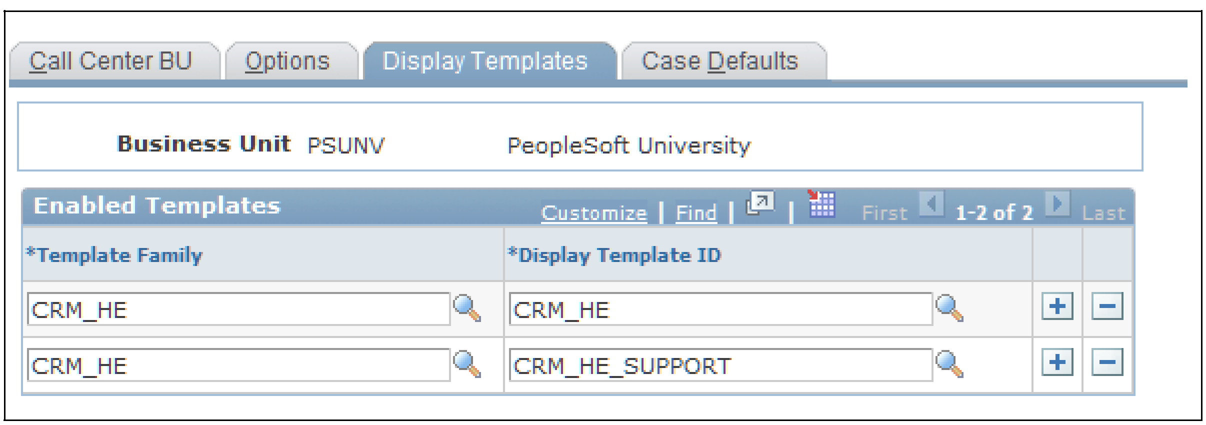
These options are defined on the Match Detail and Match Usage pages. The system uses these options to find cases that are similar to one another, thus enabling the user to identify potentially duplicate cases.

Note. If there is no Match Definition associated with this business unit (as defined in the Match Definition itself), then the two grids on this page will display "No match definition is found for Business Unit" and "No match definition is found for Provider Group."

See Chapter 3, "Setting Up Call Center Prompt Tables," Understanding Call Center Prompt Tables, page 51.

Setting Up Display Templates

Access the Display Templates page (Set Up CRM, Business Unit Related, Call Center Definition, Display Templates).



Display Templates page

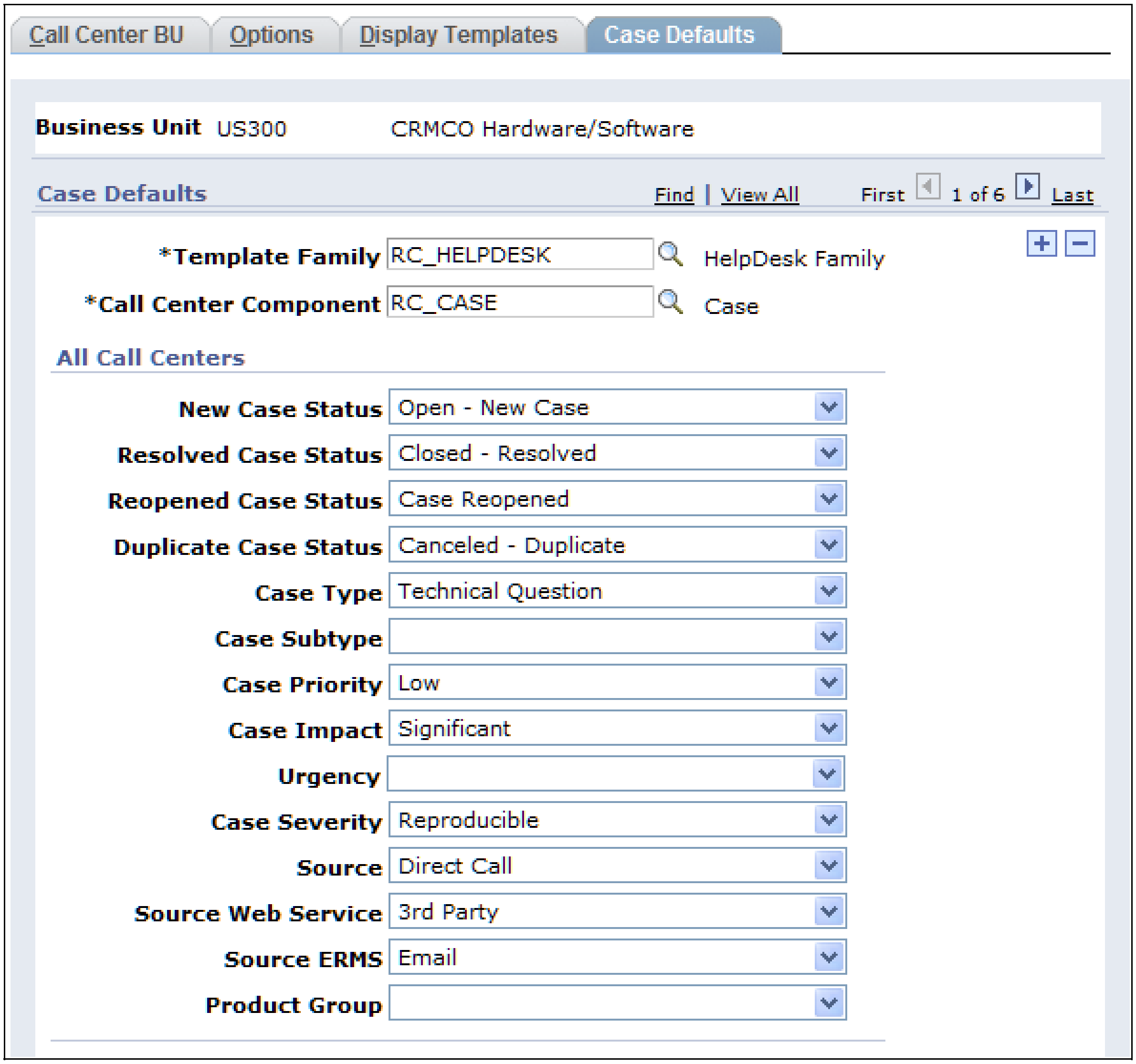
Use this page to enable the business unit for the display template family. For example if the US200 business unit needs to be enabled for support cases, then you are required to establish the link between US200 and the RC_SUPPORT family on this page.

When you select the display template ID, the system displays only the display template IDs that are associated with the display template family you selected.

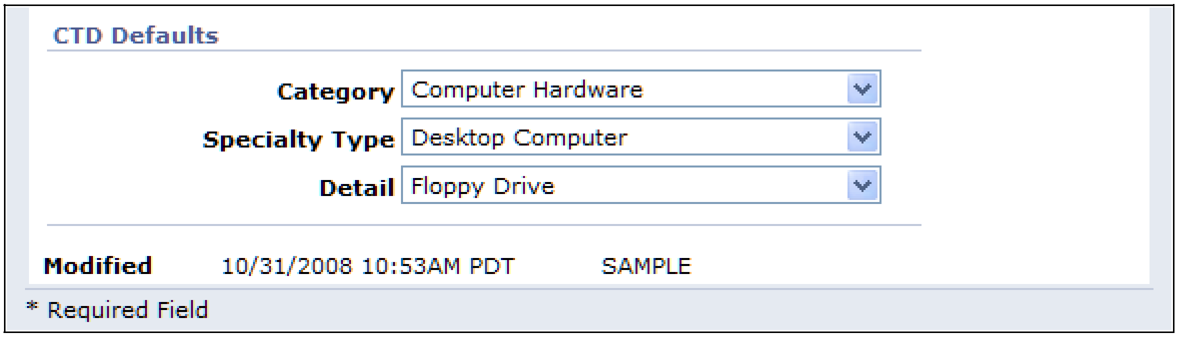
If an agent changes the business unit while on the Case page, the system looks at this page to display the correct display template family and ID.

Setting Up Case Defaults

Access the Case Defaults page (Set Up CRM, Business Unit Related, Call Center Definition, Case Defaults).



Case Defaults page (1 of 2)



Case Defaults page (2 of 2)

The fields on this page are not available for entry until you create the business unit by clicking the Create BU button on the Call Center BU page.

Case Defaults

Template Family

Select the display template family that you want to use for this business unit. The system shows all the existing display template families that are defined in the system.

Call Center Component

Select the component that you want to associate with the display template family that is displayed in the previous field. The system displays the components that are defined for the selected display template family.

You can set up different defaults for different components on the same template, and you can set up different default values for different templates that use the same business unit. When you select a component, the system may display a different set of fields, as not all default fields apply to each call center component.

All Call Centers

New Case Status

Select the status that you want the system to use when an agent opens a new case.

Note. Although most defaults are optional, the New Case Status default is required for the component that is used to report new self-service cases. Without a default value, the system cannot save the case. Also, because Case Status is a required field for a case, an agent reporting a case through a self-service application cannot set the case status.

Resolved Case Status

Select the value that you want the system to use when an agent identifies a successful solution and resolves the case.

Both agents and self-service application users can resolve cases. Agents resolve cases by setting a solution status to *Successful Resolution.*Self-service application users resolve cases by answering *Yes* when asked whether a particular solution resolved their problem. The default can be different for a self-service user than it is for an agent.

Reopened Case Status

If you selected the Allow Case to be Reopened check box on the Business Unit - Options page, select the status that you want the system to use when the self-service application user reopens a case. If you do not enter a status here, then, when an agent or self-service user reopens a case, the status will not change. The result could be cases closing without a successful resolution—a condition that the system does not normally allow.

Duplicate Case Status

If you relate one case to another, and the associated relationship type definition has the Set status of child case using duplicate case status from the Business Unit Defaults check box selected, then the child case status will be automatically set to the value specified in this field.

Note. If this field has no value, then the child case status will not be updated when it is related to another case, even if the associated relationship type definition has the Set status of child case using duplicate case status from the Business Unit Defaults option checked.

Case Type

Select the default case type for a new case.

Case Subtype

Select the default case subtype for a new case.

Case Priority

Select the default case priority for a new case.

Case Impact

Select the default case impact for a new case.

Urgency

Select the default case urgency for a new case.

Case Severity

Select the default case severity for a new case.

Source

Select the default source for the case. This field enables you to tell which cases were entered by way of self-service applications or by agents.

Source Web Service

Select the default source for a case that is created through a web service.

See Appendix C, "Delivered Web Service and Service Operations," page 555.

Source ERMS

Select the default source for a case that is created through the PeopleSoft CRM ERMS system.

See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Setting Up ERMS System."

Product Group

Select the default product group for a new case. When an agent or user selects a Product Group on a case, the system filters the values for the product and installed product to only display the products and installed products contained within the specified product group.

Category/Type/Details (CTD) Defaults

Category

Select the default case category for a new case.

Specialty Type Select the default case specialty type for a new case.

Detail Select the default case detail for a new case.

Defaults for Self-Service

These fields, which were described previously, may also appear in this section: Source, Case Type, Case Subtype, Case Priority, Case Severity and Product Group.

Assign to Provider Group Select the provider group that you want the system to use when a user opens a case for the self-service business unit.

Note Type Select the note type that you want the system to use when a user opens a case for the self-service business unit.

New Case Status Select the case status that you want the system to use when a user opens a new case for the self-service business unit.

Resolved Case Status Select the status that you want the system to use when a user identifies a successful solution a case for the self-service business unit.

Closed Case Status Select the status that you want the system to use when a user closes a case for the self-service business unit.

Reopened Case Status Select the status that you want the system to use when a user reopens a case for the self-service business unit. If you do not enter a status here, then the status will not change when the self-service user reopens a case. The result could be cases being closed without a successful resolution—a condition that the system does not normally allow.

Contact Me Provider Group Select the provider group that you want the system to use when a user clicks the Contact Me button on a case for the self-service business unit.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," page 51

Defining Display Template General Options for PeopleSoft Call Center

This section discusses how to enable pages and general options for PeopleSoft Call Center applications.

Note. For detailed information on using display templates and configuring pages to display specific fields and sections, refer to the documentation mentioned in the next section.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Display Templates"

Page Used to Enable Pages and General Options for PeopleSoft Call Center

Page Name	***Definition Name***	***Navigation***	***Usage***
Display Template	RDT_TMPL_PAGE	Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details	Use this page as an entry point to control the appearance and behavior of the specified component.

Enabling Pages and General Options

Access the Display Template page (Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details).

Display Template

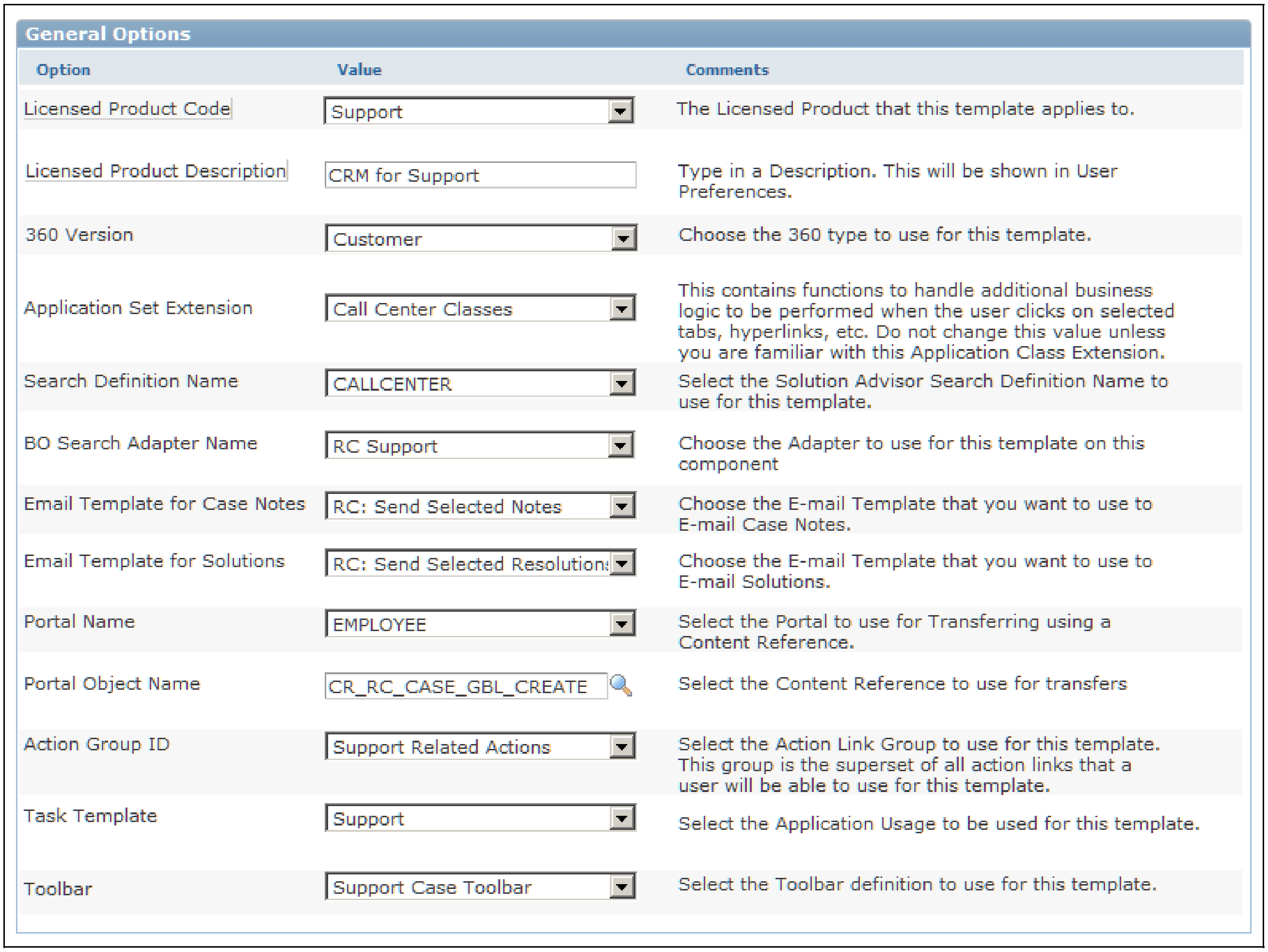
Template ID RC_SUPPORT **Family** Support Case Family

Description Support **Component** RC_CASE

Pages

Enable	Page	Add Mode Default	Update Mode Default	Comments
[x]	Case	[x]	[ ]	Case Main page
[x]	Solution	[ ]	[ ]	Solution
[x]	Summary	[ ]	[x]	Summary
[x]	Notes	[ ]	[ ]	Case Note
[x]	Tasks	[ ]	[ ]	Case Tasks
[x]	Case History	[ ]	[ ]	History
[x]	Related Cases	[ ]	[ ]	Related Cases
[x]	Related Actions	[ ]	[ ]	Related Objects
[x]	Interested Parties	[ ]	[ ]	Interested Parties
[ ]	Billing	[ ]	[ ]	Billing
[ ]	Attributes	[ ]	[ ]	Attributes
[x]	Case Print View	[ ]	[ ]	Enabling this page to open the Printable Case page in a new window when the Print button is pressed

Display Template page (1 of 2)



Display Template page (2 of 2)

Select a display template from the list and use it to configure the corresponding component.

Note. You can review a list of system-delivered display templates in the Display Template Details component.

Pages

This grid lists the pages that are configurable for the component.

Page	Click to access the Display Template - Page Definition page to configure the sections and fields of the selected page. The names of pages that are not enabled appear in plain text.

Add Mode Default Select to show the corresponding page by default when you create a transaction for the component. Selecting this check box is optional and you can select only one page as the default. If you don't identify a default page, the system displays the page that is specified for the component in Application Designer.

If users access the component and they don't have permission to access the default page, the system displays the first page in the component that the user has permission to access.

Update Mode Default Select to show the corresponding page by default when you open an existing transaction for the component. Selecting this check box is optional. You can select only one page as the default. The display logic that is used for the add mode applies to the update mode as well.

General Options

This section of the page presents the features and functionality that are enabled in the component system data definition. The list varies depending on the number of feature options that are enabled for a given component.

Typically, you select a value for each listed option. This grid does not appear if IT administrators have not enabled any general options in the component's system data to be configured through display templates.

Note. You should not need to modify any of the general options on your display template. Display templates come pre-configured with all the appropriate general options selected.

Licensed Product Code Select the licensed product that this display template applies to.

Licensed Product Definition Enter a description of the licensed product identified in the previous field.

360 Degree Version Select the type of *360-Degree View* that you want to use for this template. Options are *Customer*,*Constituent*,*HRHD Worker,* and *Worker.*

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up the 360-Degree View."

Application Set Extension This option contains functions to handle additional business logic to be performed when the user clicks selected tabs, links, and other items on the page. Do not change this value unless you are familiar with this application class extension.

Search Definition Name Select the Solution Advisor Search Definition Name that you want to use for this template.

See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook,* "Setting Up Solution Management," Defining Record-Based Search Index Templates.

BO Search Adapter Name (business object search adapter name)

Select the adapter to use for this template on this component. The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the sub-pages of the component upon which these fields appear.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create."

Email Template for Case Notes

Select the default correspondence template that you want to use to email case notes to customers or employees.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Defining Settings for Template-Based Correspondence."

Email Template for Solutions

Select the default correspondence template that you want to use to email solutions to customers or employees.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Defining Settings for Template-Based Correspondence."

Portal Name

Select the portal that you want the system to use for transferring information when you are using a content reference.

See Chapter 5, "Setting Up Links and Related Actions," Understanding Link Setup, page 99.

Portal Object Name

Select the content reference that you want the system to use for transfers.

See Chapter 5, "Setting Up Links and Related Actions," Understanding Link Setup, page 99.

Action Group ID

Select the action link group that you want the system to use for this template. This group is the superset of all action links that a user will be able to use for this template.

See Chapter 5, "Setting Up Links and Related Actions," page 99.

Task Template

Select the application usage to filter which task templates are available on the case for that display template.

Toolbar

Select which toolbar should appear on the case for that display template.

Managing Policies Using Case Display Template Actions

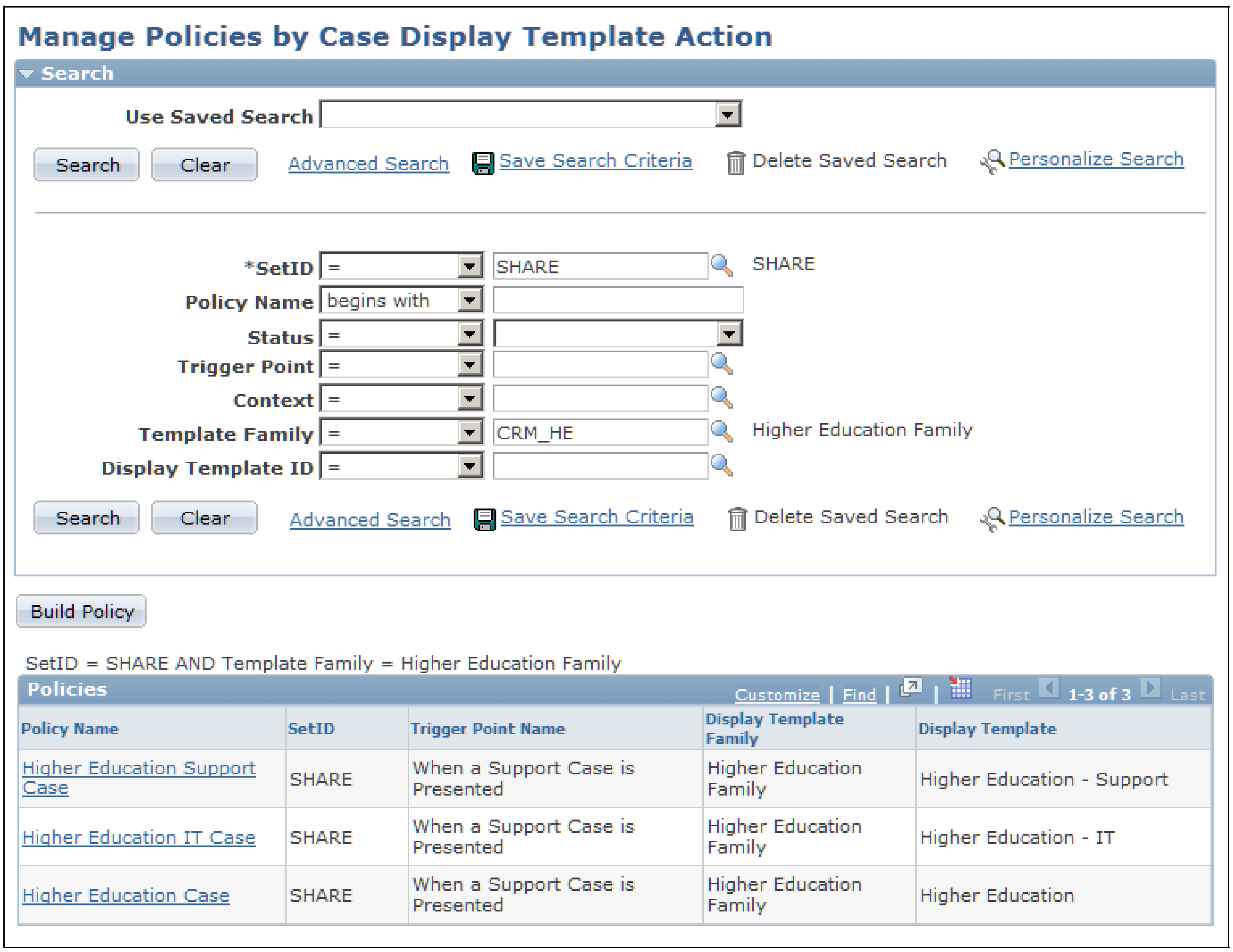
This section discusses how to manage policies using case display template actions.

Page Used to Manage Policies Using Case Display Template Actions

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Policies by Case Display Template Action	RC_RDT_PLCY_SRCH	Set Up CRM, Common Definitions, Component Configuration, Display Templates, Case Display Template Policies	View AAF policies that are using the Case Display Template action.

Managing Policies Using Case Display Template Actions

Access the Manage Policies by Case Display Template Action page (Set Up CRM, Common Definitions, Component Configuration, Display Templates, Case Display Template Policies).



Manage Policies by Case Display Template Action page

To locate policies that are related to certain setIDs, trigger points, contexts, display template families, or display template IDs, select or enter information in the appropriate fields shown in the Search section, and then click Search.

Chapter 3

Setting Up Call Center Prompt Tables

This chapter provides an overview of the call center prompt tables, lists common elements, and discusses how to:

- Set up basic prompt tables for cases.
- Set up problem codes for PeopleSoft Support material returns.
- Set up reason codes.
- Set up case relationship types and labels.
- Set up case matching criteria to identify possible duplicate cases.

Note. Call Center prompt tables refer to a group of relatively simple setup tables that hold the values for various drop-down list box fields in the Case component.

See Also

Chapter 5, "Setting Up Links and Related Actions," Understanding Link Setup, page 99

Understanding Call Center Prompt Tables

This section discusses:

- Call center prompt tables.
- Delivered values in call center prompt tables.

Call Center Prompt Tables

This section explains the different types of prompt tables that you must set up for all core call center application prompt tables.

Prompt Tables for All Cases

To get your PeopleSoft CRM call center application up and running, define values for these fields:

- Case Status (required)

- Case Type
- Impact
- Priority
- Urgency
- Severity
- Source
- Category, Specialty Type, and Details
- Problem Type
- Quick Code

Each quick code may be associated with values from one to up to over twenty different case fields. Values referenced by a currently active quick code cannot be deleted. When an agent enters a quick code on the Case page, the system automatically enters all of the related data. It does not save the quick code to the case.

Problem types are defined by the product for which a case is being created. Use problem types to associate products with the competencies that one needs to resolve a problem. Because Problem Type is a child of Product, the Problem Type field on the Case page derives its values from Product. The Product must be set up before Problem Type.Competencies for Problem Type are not restricted, however.

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook,* "Setting Up Products."

Problem Codes for PeopleSoft Support Material Returns

This topic is specific to PeopleSoft Support.

Problem codes identify why a customer is returning stock on return material authorizations (RMAs) created in PeopleSoft Support. If your PeopleSoft Support system is integrated with PeopleSoft Inventory, the problem codes that you select on RMAs must match reason codes defined in PeopleSoft Inventory. In addition, the matching reason codes in PeopleSoft Inventory must be defined with a reason type of *Return Material Authorization.* When the RMA is staged in PeopleSoft Inventory, the problem code is used as the reason code. If the reason code on the RMA form does not exist in PeopleSoft Inventory, the system logs an error when the RMA EIP (return material authorization enterprise integration point) application message is processed.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Problem Codes for Material Returns, page 82.

Reason Codes

Enter reason codes to define reasons for various actions. Reason types are associated with a reason code and include:

- Reasons why a person has been associated with a case as an interested party.
- Reasons why a self-service user is closing a case.
- Reasons why a self-service user is reopening a case.

- Reasons for billing adjustments. (Used with billing contract integration.)

  See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Reason Codes, page 83.

Case Relationship Types

Cases can be related to each other for many reasons. Here are some examples:

- A global case affects many people, but one resolution solves the problem for everybody.

  Suppose that your website is down because of a problem with the web server. Many people are reporting the same problem. You only need to fix the problem once to resolve everyone's problem. Create a global case for the problematic web server and child cases (sometimes called tickets) where each person is reporting the problem. Maintain a parent-child relationship between the global case and all of the tickets. Based on this relationship, you can close all of the child tickets once the global case is closed.

  See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84.

- A common case affects many people, but each affected person requires a separate resolution.

  Suppose that a software bug is causing problems. Again, many people are reporting the problem, but this time each individual must apply a software patch. Create a common case to track the problem and create child cases for each individual reporting the problem. Based on this relationship, you can track the effect of the problem across your organization. This common-case parent-child relationship differs from the web server global case because you do not want to close the child cases when the common case is closed.

- A similar case helps an agent to resolve another case.

  Suppose that two people have reported problems with their desktop computers. The problems sound similar, and each assigned agent wants to monitor activity on the other case. Similar cases are functionally related, but they do not have a hierarchical relationship.

Other kinds of cases include cause-and-effect and case relationships that can occur in your business operating environment.

Establish valid case relationship types on the Case Relationship Type page. Each relationship is marked as hierarchical or equivalent (non-hierarchical). Each case in a relationship has a relationship label. If the relationship is hierarchical, separate labels exist for the parent case and the child case. If the relationship is equivalent, only one valid label exists.

If the case is not a hierarchical relationship, the Relationship field controls how the relationship is described on the Related Cases page. If you look at either one of the related cases, the Relationship field displays the equivalent label.

See Also

Chapter 10, "Managing Cases," page 241

Chapter 11, "Processing Cases," page 303

Chapter 14, "Managing Material Returns," page 381

Chapter 18, "Using Change Management," page 425

Chapter 21, "Working with Self-Service Application Transactions," page 485

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Integrating with PeopleSoft Applications"

PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)

Delivered Values in Call Center Prompt Tables

This section discusses delivered relationship types. All of these values are associated with the SHARE setID.

These values are used in Active Analytics Framework (AAF) policies. For example, the PeopleSoft system delivers AAF policies to cascade case statuses and to send notifications to owners of related cases when a case status changes. If you use the delivered policies, you must use the delivered values or change the event processing rules to reference new values.

Relationship Types

This table lists the delivered relationship types:

Type	Hierarchical	Short Name	Labels
COMMO	Yes	Common	Parent, Child
DUP	Yes	Duplicate	Original, Duplicate
EQUAL	No	Equivalent	(none)
GLOBE	Yes	Global	Parent, Child

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

Common Elements Used in this Chapter

SetID

Except for quick codes, which are associated with business units, all of the prompt tables described in this chapter are associated with setIDs. This association enables you to set up different sets of values for different call center business units.

If you're setting up one set of values for all of your call centers, use the same setID for all of the values.

If you're setting up different sets of values for different call centers, enter the appropriate setID for each value.

Self-Service

Select this check box to inform the system as to which values or fields self-service application users can select when creating new cases.

Select this check box to allow self-service application users to select priorities of *Low* and *Standard*, but not *High.*

This check box does not affect the self-service application users' ability to see the value when viewing an existing case; it only affects their ability to select the value when creating a new case.

This check box is relevant only for fields that self-service application users can edit.

Short Name

Enter a short name that describes the value to users of the Case page.

Note. Although you can enter up to 20 characters, names longer than 15 characters might be truncated in the drop-down list boxes on the Case page.

Self-Service Description

Enter a description regardless of whether the Self-Service check box is selected. This entry describes the value to self-service application users. Even if users cannot select a value (the behavior controlled by the check box), they still may be able to view it.

If you don't enter a description, the system copies the short description to this field when you save the page.

If the value appears on any of the self-service pages, the self-service description appears instead of the regular short description.

Long Description

Enter a long name, up to 50 characters, that describes the value.

Effective Date

Enter the effective date of the value.

Most prompt table values are not effective-dated; only quick codes and reason codes have effective dates.

Status

Select a status to determine whether an effective-dated item (a quick code or a reason code) is active or inactive as of the associated effective date.

Setting Up Basic Prompt Tables for Cases

To set up basic prompt tables for cases, use the Quick Code (RC_QUICK_CODE), Source (RC_SOURCE), Severity (RC_SEVERITY), Priority (RC_PRIORITY), Case Type (RC_CASE_TYPE), Case Status (RC_STATUS), Category/Type/Detail (RC_CTD_DEFINE), Combine Category/Type/Detail (RC_CTD_COMBINE) and Impact (RC_IMPACT) components.

This section lists prerequisites and discusses how to:

- Set up case statuses.
- Set up case types.
- Set up case priorities.
- Set up case urgency values.
- Set up case severity values.
- Set up impact values.
- Set up case sources.
- Set up problem types.
- Set up individual case categories, speciality types and details.
- Set up combinations of case categories, speciality types and details.
- Set up quick codes.

Prerequisites

Before you set up the prompt tables for your call center application, consider the following:

- Before you set up quick codes, set up all of the values to be referenced by the quick code.

  Quick codes may reference most of the other setup values discussed in this section.
- You must set up your products before you can set up problem types.
- If you want to use competencies in case assignment, establish competencies before you set up the Category, Specialty Type, Detail, and Problem Types pages.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Managing Solutions"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Maintaining Provider Groups and Group Members"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Managing Workforce Competencies," Setting Up Competency Information in PeopleSoft CRM

Pages Used to Set Up Prompt Tables for All Cases

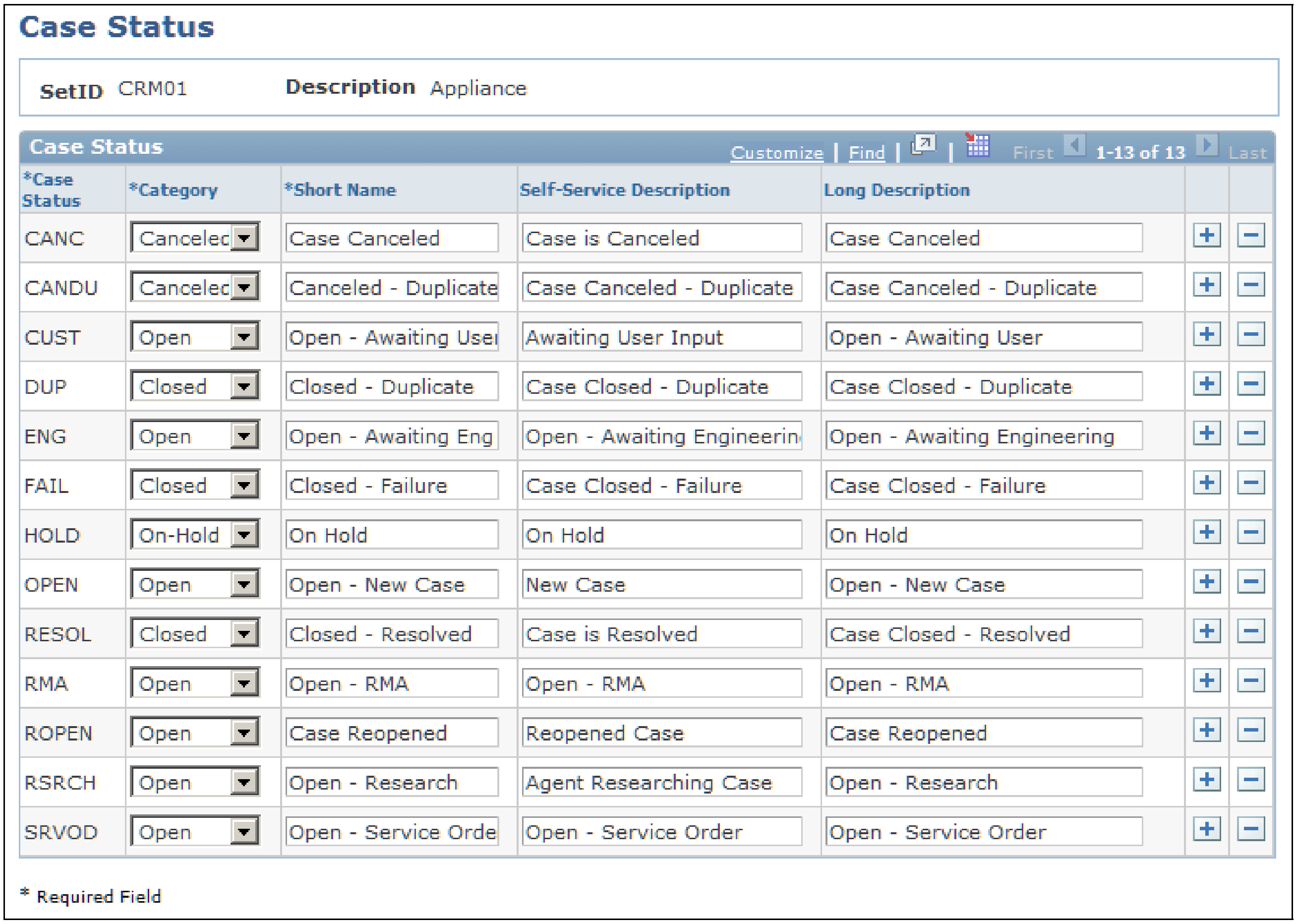
Page Name	*Definition Name*	*Navigation*	*Usage*
Case Status	RC_STATUS	Set Up CRM, Product Related, Call Center, Case Status, Case Status	Set up case status values.
Case Type	RC_CASETYPE	Set Up CRM, Product Related, Call Center, Case Type, Case Type	Set up case type values.
Priority	RC_PRIORITY	Set Up CRM, Product Related, Call Center, Priority, Priority	Set up case priority values.
Urgency	RC_URGENCY	Set Up CRM, Product Related, Call Center, Urgency, Urgency	Set up case urgency values.
Severity	RC_SEVERITY	Set Up CRM, Product Related, Call Center, Severity, Severity	Set up case severity values.
Impact	RC_IMPACT	Set Up CRM, Product Related, Call Center, Impact, Impact	Set up impact values.
Source	RC_SOURCE	Set Up CRM, Product Related, Call Center, Source, Source	Set up valid methods people can use to report cases. You can track cases that are created through self-service or cases that are initially created by your computer and telephony integration system.

Page Name	***Definition Name***	***Navigation***	***Usage***
Problem Type	RC_PROBTYPE	Set Up CRM, Product Related, Call Center, Problem Type, Problem Type	Set up problem types. Associate problem types to products and the competencies that one would need to resolve the particular problem.
Category	RC_CTD_CATEGORY	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category	Set up case category values.
Category Competencies	RC_CTD_CAT_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category Competencies	Set up case category competency values.
Specialty Type	RC_CTD_TYPE	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type.	Set up case specialty types.
Specialty Type Competencies	RC_CTD_TYPE_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type Competencies.	Set up case specialty type competencies.
Detail	RC_CTD_DETAIL	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail.	Set up case details.
Detail Competencies	RC_CTD_DETAIL_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail Competencies.	Set up case detail competencies.
Combine Category/Type/Detail	RC_CTD_COMBINE	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Combine Category/Type/Detail.	Set up valid combinations of category, specialty type, and detail.
Combine Category/Type/Detail: Competencies	RC_CTD_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Combine Category/Type/Detail. Click the Competencies button for the desired Category/Type/Detail Result grid row.	View and edit competencies linked to the category, specialty type and detail associated with row of the grid from which the user clicked the Competencies button.

Page Name	*Definition Name*	*Navigation*	*Usage*
Quick Code	RC_QUICK_CODE	Set Up CRM, Product Related, Call Center, Quick Code, Quick Code	Set up quick code shortcuts that an agent can use to enter data automatically into various fields on the Case page.

Setting Up Case Statuses

Access the Case Status page (Set Up CRM, Product Related, Call Center, Case Status, Case Status).



Case Status page

Category Select a case category value for each case status. This value drives many of your call center metrics. Because the actual status values vary by implementation, certain system processing is based on the category field rather than the actual case status. All statuses fall into one of these categories:

Open: Case needs to be resolved.

Closed: Case is resolved and no further work is necessary.

Canceled: Case is not resolved, but there is no longer any need to resolve the case.

On-Hold: Case is on-hold, and the case needs to be resolved.

Billable Select if you bill for support and integrate your CRM data with a PeopleSoft or third-party billing system.

See Also

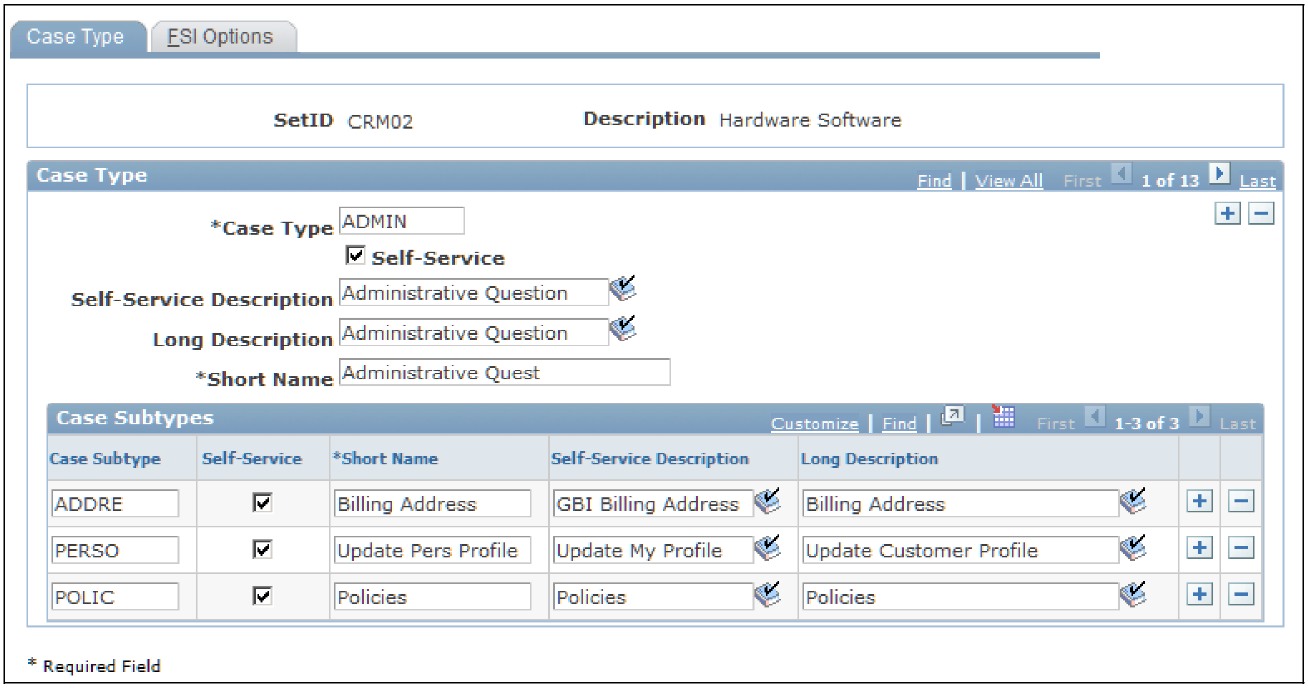
Chapter 3, "Setting Up Call Center Prompt Tables," Delivered Values in Call Center Prompt Tables, page 54

Chapter 10, "Managing Cases," Case Closure, page 256

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Transaction Billing Processor Integration"

Setting Up Case Types

Access the Case Type page (Set Up CRM, Product Related, Call Center, Case Type, Case Type).



Case Type page

Enter descriptions for the Case Type, Self-Service Description, Long Description, and Short Name fields. Select the Self-Service check box if the case type will be used in the self-service application.

VAT Defaults Click this link to access the VAT Defaults Setup page. This is a common page that is used to set up value-added tax (VAT) defaults for all PeopleSoft applications that process VAT transactions. Use this page to define VAT defaults for service groups according to VAT registration country and state. The system displays VAT defaults and Service VAT Treatment defaults only when the integration to PeopleSoft Transaction Billing Processor is installed.

Service VAT Treatment Defaults Click this link to access the Service VAT Treatment Drivers Setup page. This common page is used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for service groups on this page for a supplier's (seller's) location country and state.

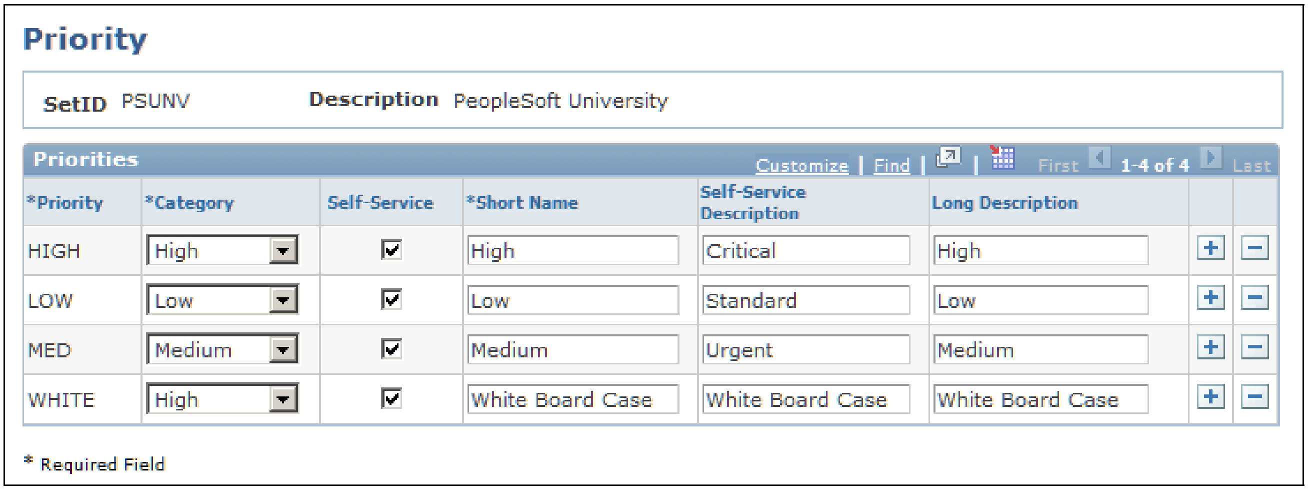
Case Subtypes Use the fields in this section to enter descriptions of the case subtype that you want to associate with the case type that is described in the Case Type field.

See Also

PeopleSoft Enterprise Global Options and Reports PeopleBook, "Working with Value Added Taxes (VAT)"

Setting Up Case Priorities

Access the Priority page (Set Up CRM, Product Related, Call Center, Priority, Priority).



Priority

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Priorities Customize | Find | First 1-4 of 4 Last

*Priority	*Category	Self-Service	*Short Name	Self-Service Description	Long Description
HIGH	High	☑	High	Critical	High
LOW	Low	☑	Low	Standard	Low
MED	Medium	☑	Medium	Urgent	Medium
WHITE	High	☑	White Board Case	White Board Case	White Board Case

* Required Field

Priority page

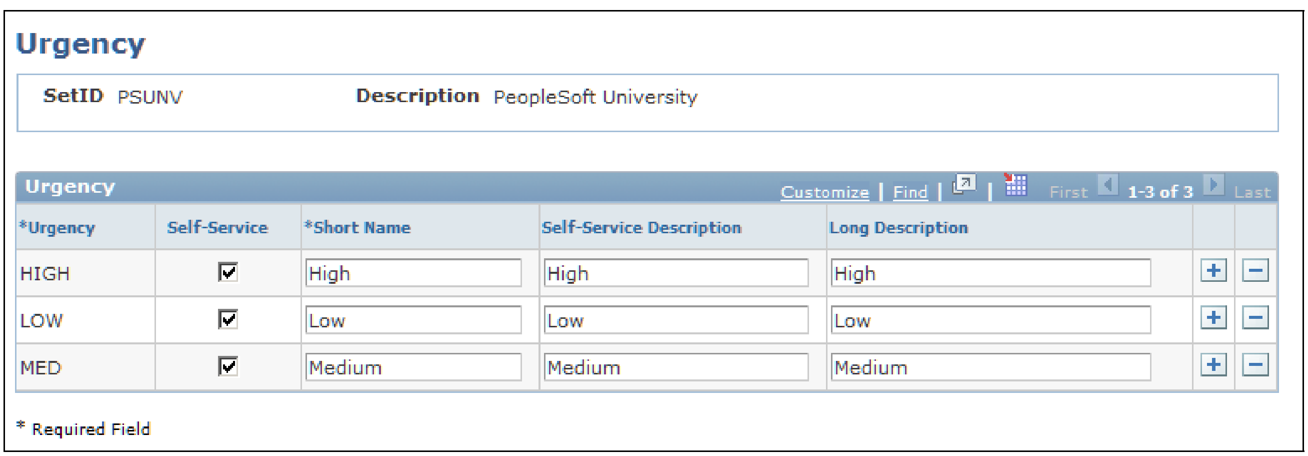
Category Select the category that you want the system to associate with the entry in the Priority field. All priority values are associated with a priority category. Values include *High, Medium,* and *Low.* The association between a priority and a priority category enables the display of the High Priority Problem Reports chart to help identify high-priority cases.

Self-Service Description Enter the descriptions of the priorities as you want them to appear on the self-service page of your call center application.

Use the priority values to indicate how quickly a problem or case must be fixed.

Setting Up Case Urgency Values

Access the Urgency page (Set Up CRM, Product Related, Call Center, Urgency, Urgency).



Urgency

SetID PSUNV Description PeopleSoft University

Urgency Customize | Find | First 1-3 of 3 Last

*Urgency	Self-Service	*Short Name	Self-Service Description	Long Description
HIGH	☑	High	High	High
LOW	☑	Low	Low	Low
MED	☑	Medium	Medium	Medium

* Required Field

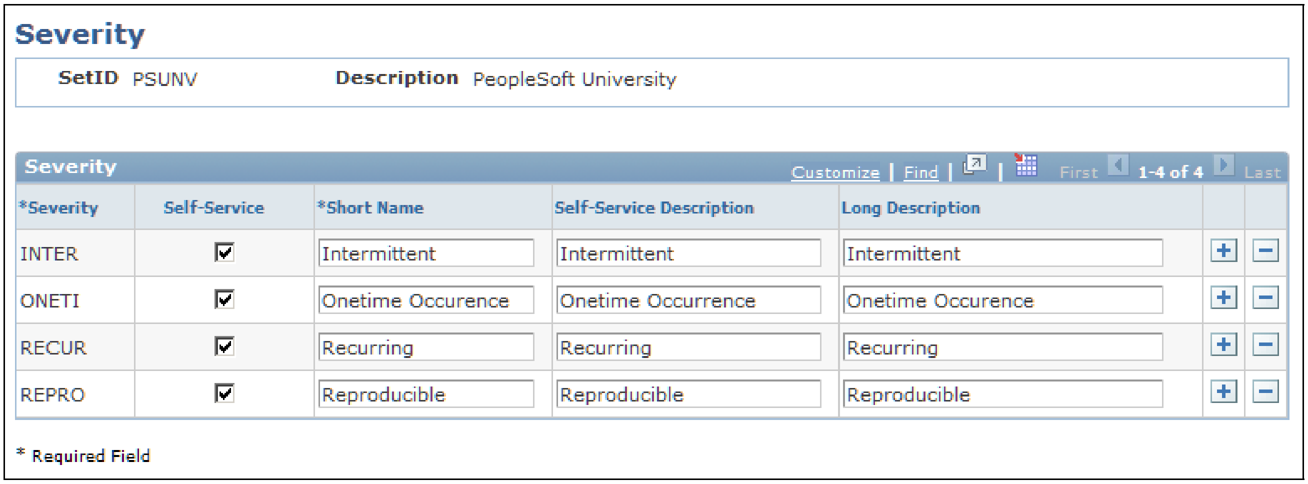
Urgency page

Self-Service Description Enter the descriptions of the urgency values as you want them to appear on the self-service page of your call center application.

Use the urgency values to indicate the business impact of the case or issue.

Setting Up Case Severity Values

Access the Severity page (Set Up CRM, Product Related, Call Center, Severity, Severity).

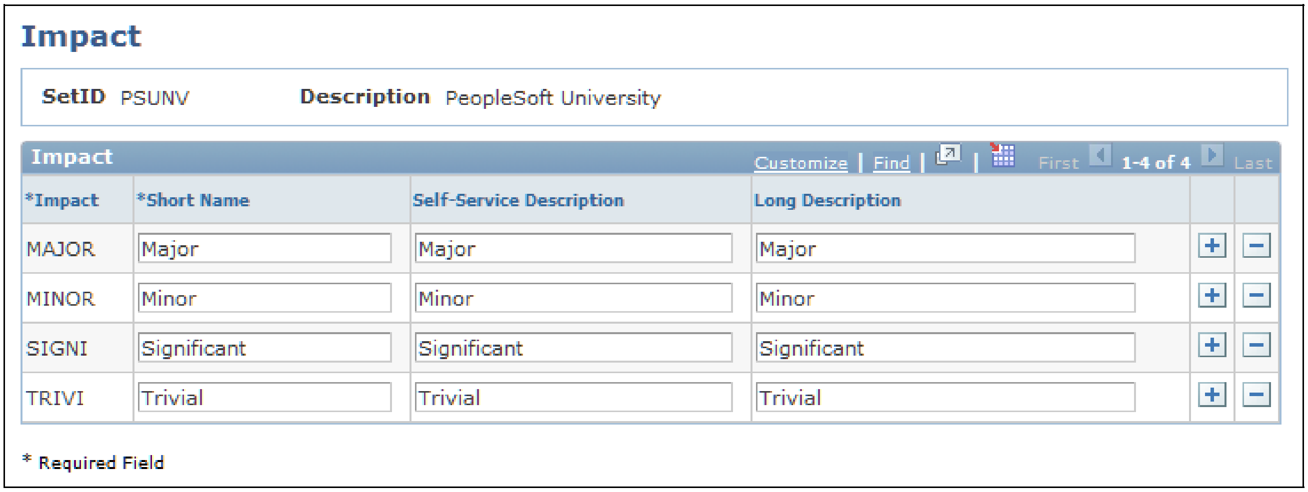


Severity page

Select the Self-Service check box if you want the value for the severity to appear on the self-service page of your call center application. Use the Self-Service Description field to enter a description of the severity that self-service users will understand.

Setting Up Impact Values

Access the Impact page (Set Up CRM, Product Related, Call Center, Impact, Impact).

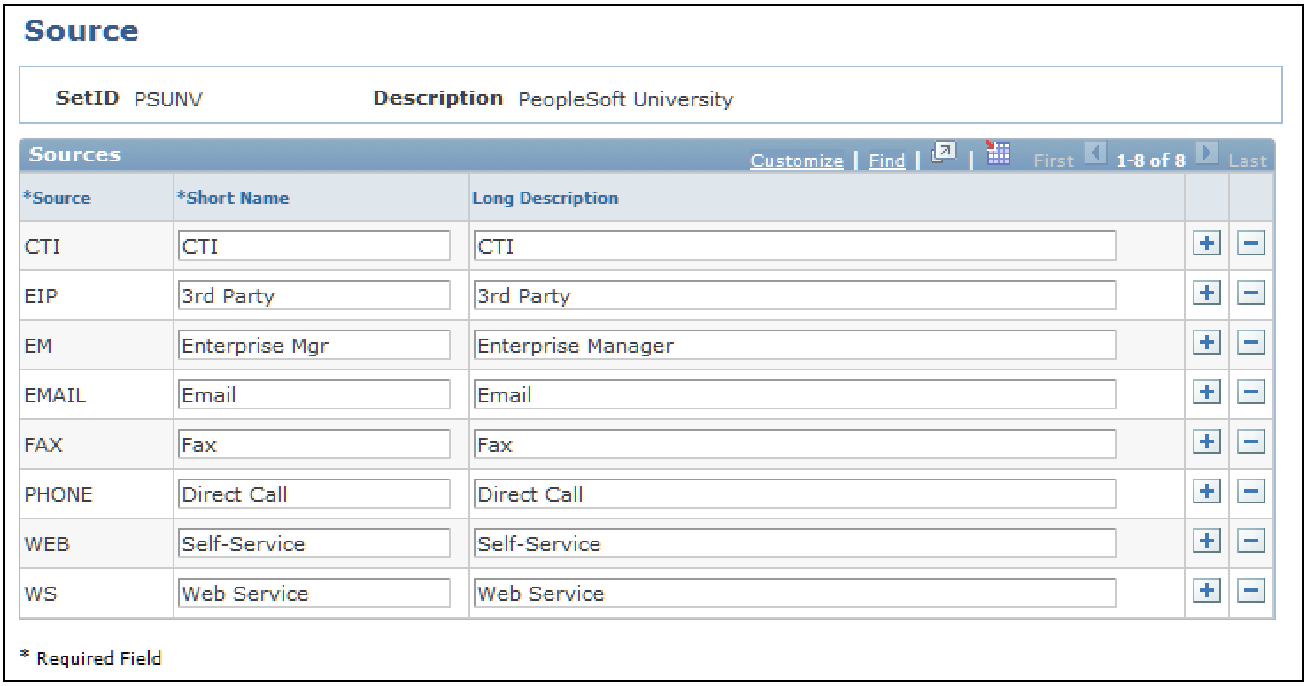


Impact page

To enter a new impact, click the Add a new row button. Enter a code to represent the effect in the Impact field. Then enter descriptions of the effect in the Short Name, Self-Service Description, and Long Description fields.

Setting Up Case Sources

Access the Source page (Set Up CRM, Product Related, Call Center, Source, Source).

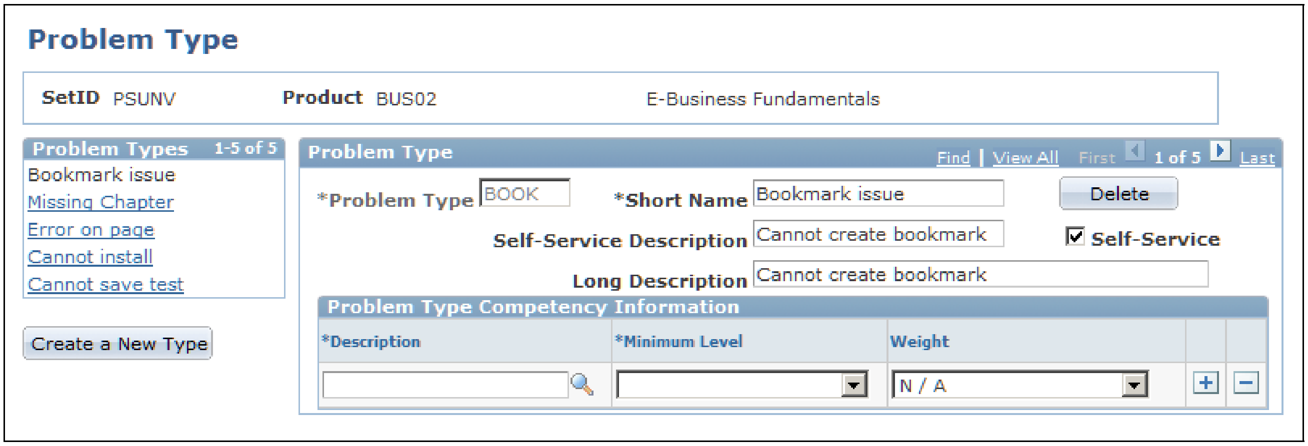


Source page

Enter descriptions for the various sources that you use to collect information for your call center applications.

Setting Up Problem Types

Access the Problem Type page (Set Up CRM, Product Related, Call Center, Problem Type, Problem Type).



Problem Type page

Problem Type

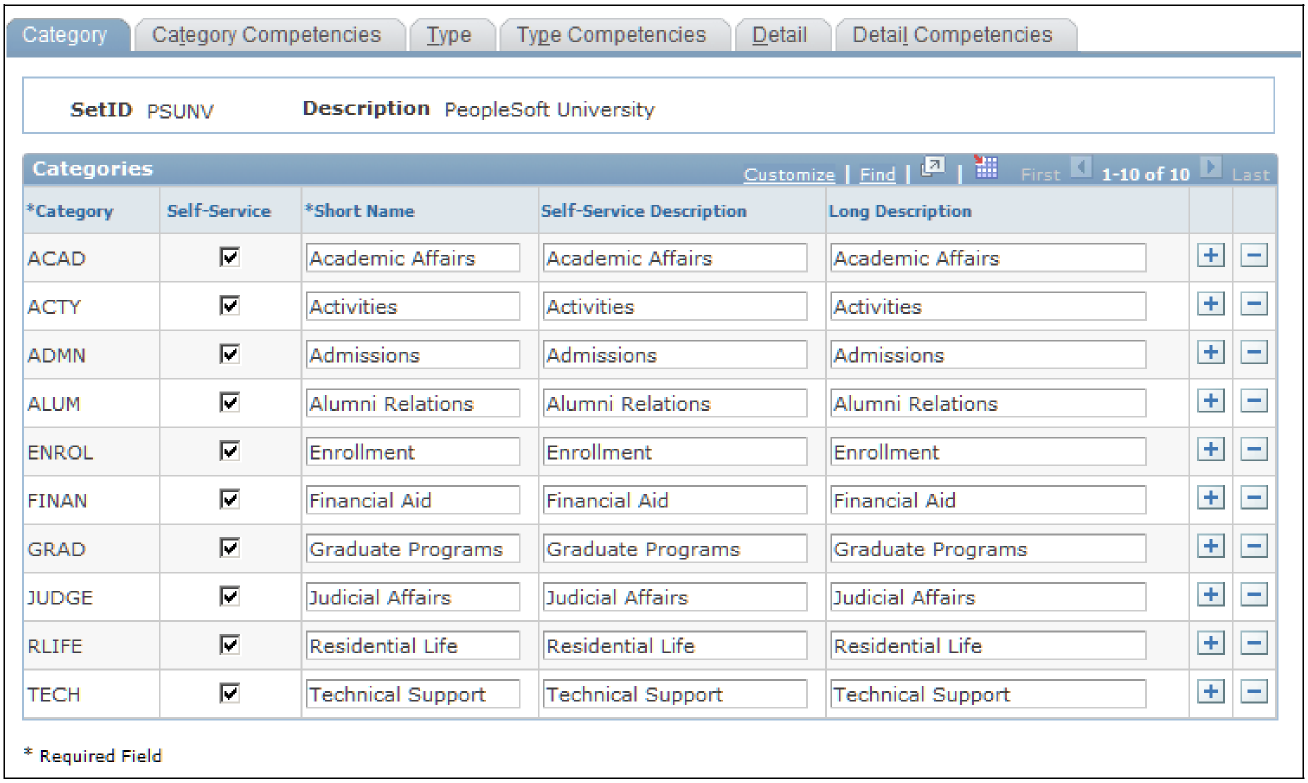
Problem Type	Enter an abbreviation to represent the problem type. Abbreviations can be no longer than five characters.

Problem Type Competency Information

Description	Select the competency needed to resolve the problem.
Minimum Level	Select the minimum skill level that a person would need to resolve the problem for the selected competency.
Weight	Select the level of importance that you want to assign to the competency. The system uses this weighting factor during the assignment process to locate the best person available to resolve the problem.

Setting Up Case Categories

Access the Category page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category).



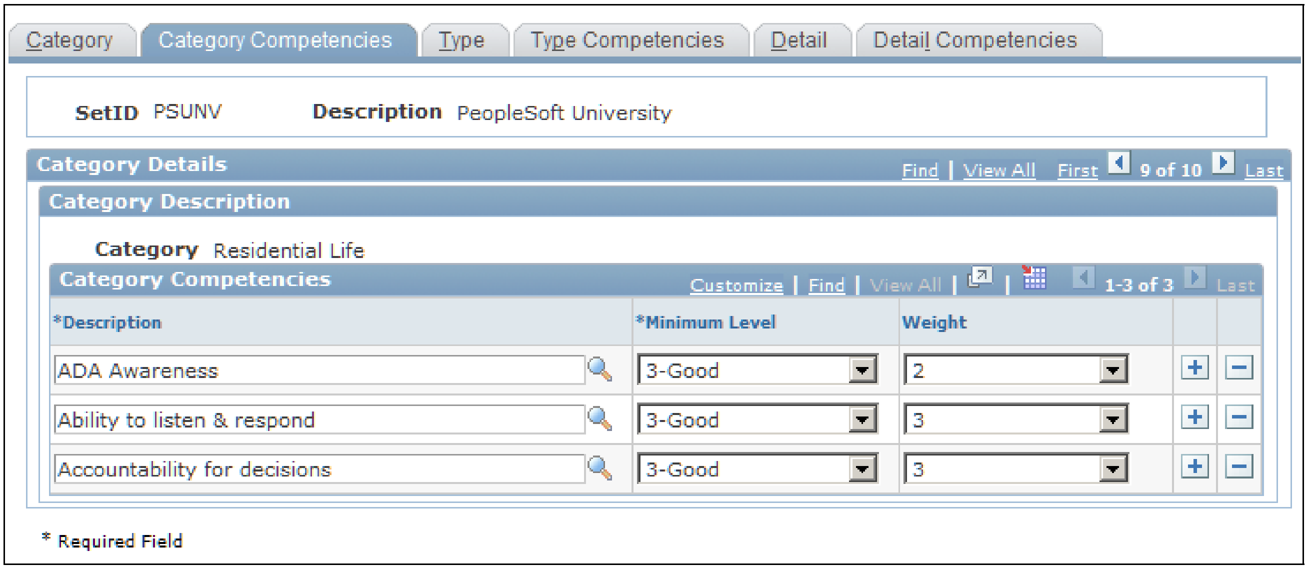
Category page

To enter a new category, click the Add a new row button. Enter a code in the Category field, then enter descriptions in the Short Name, Self-Service Description, and Long Description fields.

Select the Self-Service check box if the category will be used in the self-service application. Note that if Self-Service is not installed, the Self-Service check box and Self-Service Description, field will be hidden.

Setting Up Case Category Competencies

Access the Category Competencies page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category Competencies).



Category Competencies page

Category Competency Information

Description Select the competency needed to resolve problems for the displayed category.

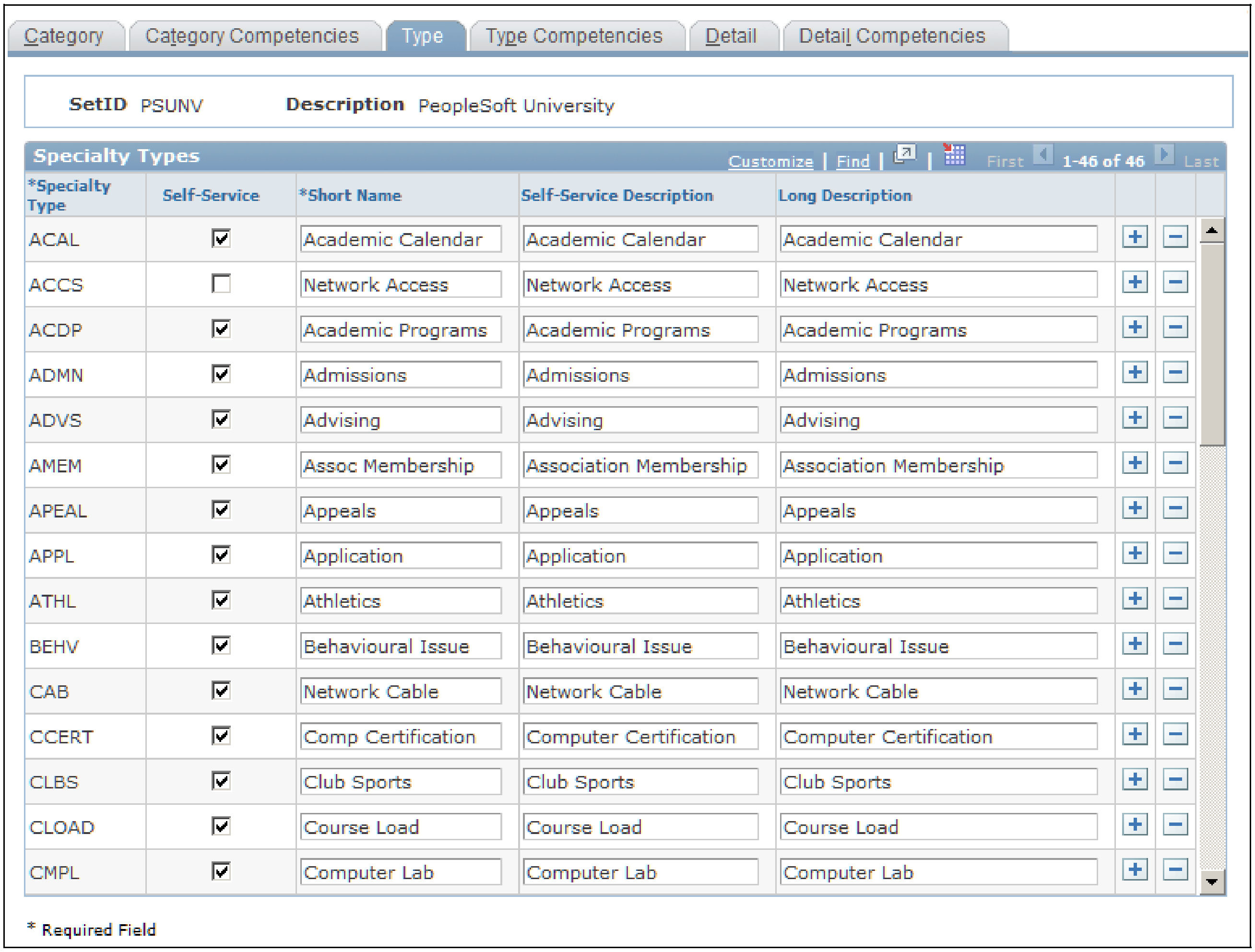
Minimum Level Select the minimum skill level that a person would need to resolve the problem for the selected competency.

Weight Select the level of importance that you want to assign to the competency. The system uses this weighting factor during the case assignment process to locate the best person available to resolve the problem.

Setting Up Case Specialty Types

Access the Type page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type).

Note. Though this page is simply entitled Type, be aware that it refers to Specialty Type (do not confuse it with the Case Type page).


Category | Category Competencies | Type | Type Competencies | Detail | Detail Competencies

SetID PSUNV **Description** PeopleSoft University

Specialty Types Customize | Find | First 1-46 of 46 Last

*Specialty Type	Self-Service	*Short Name	Self-Service Description	Long Description
ACAL	☑	Academic Calendar	Academic Calendar	Academic Calendar
ACCS	☐	Network Access	Network Access	Network Access
ACDP	☑	Academic Programs	Academic Programs	Academic Programs
ADMN	☑	Admissions	Admissions	Admissions
ADVS	☑	Advising	Advising	Advising
AMEM	☑	Assoc Membership	Association Membership	Association Membership
APEAL	☑	Appeals	Appeals	Appeals
APPL	☑	Application	Application	Application
ATHL	☑	Athletics	Athletics	Athletics
BEHV	☑	Behavioural Issue	Behavioural Issue	Behavioural Issue
CAB	☑	Network Cable	Network Cable	Network Cable
CCERT	☑	Comp Certification	Computer Certification	Computer Certification
CLBS	☑	Club Sports	Club Sports	Club Sports
CLOAD	☑	Course Load	Course Load	Course Load
CMPL	☑	Computer Lab	Computer Lab	Computer Lab

* Required Field

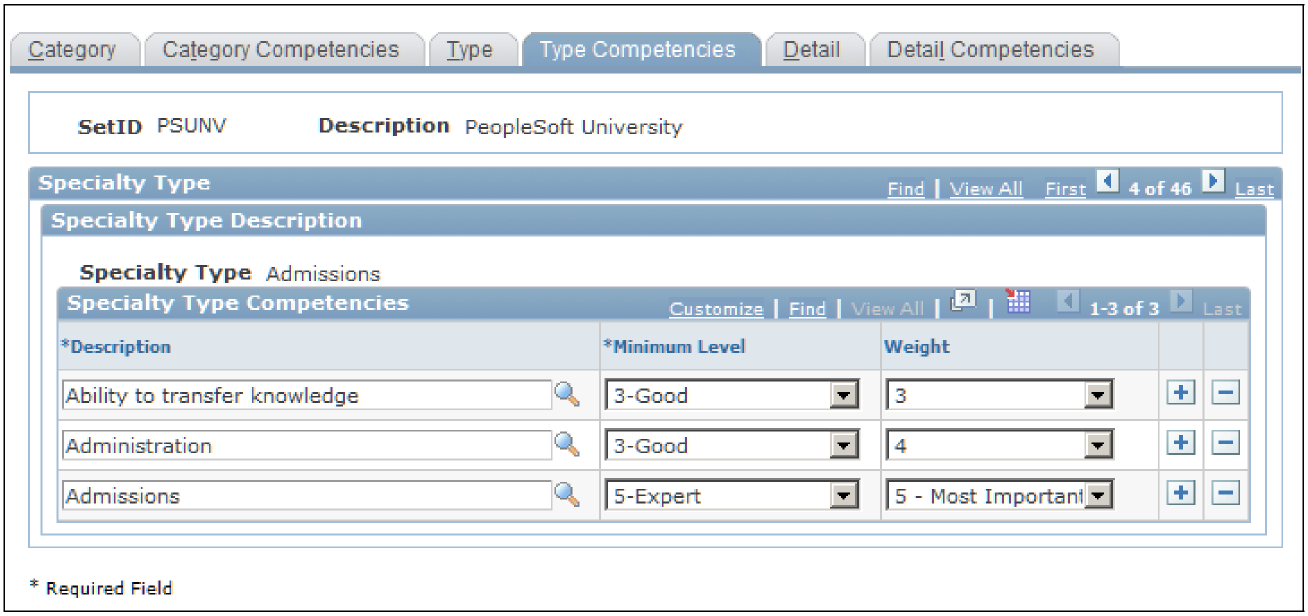
Specialty Type page

To enter a new specialty type, click the Add a new row button. Enter a code in the Specialty Type field, then enter descriptions in the Short Name, Self-Service Description, and Long Description fields.

Select the Self-Service check box if the specialty type will be used in the self-service application. Note that if Self-Service is not installed, the Self-Service check box and Self-Service Description, field will be hidden.

Setting Up Case Specialty Type Competencies

Access the Type Competencies page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type Competencies).



Specialty Type Competencies page

Specialty Type Competency Information

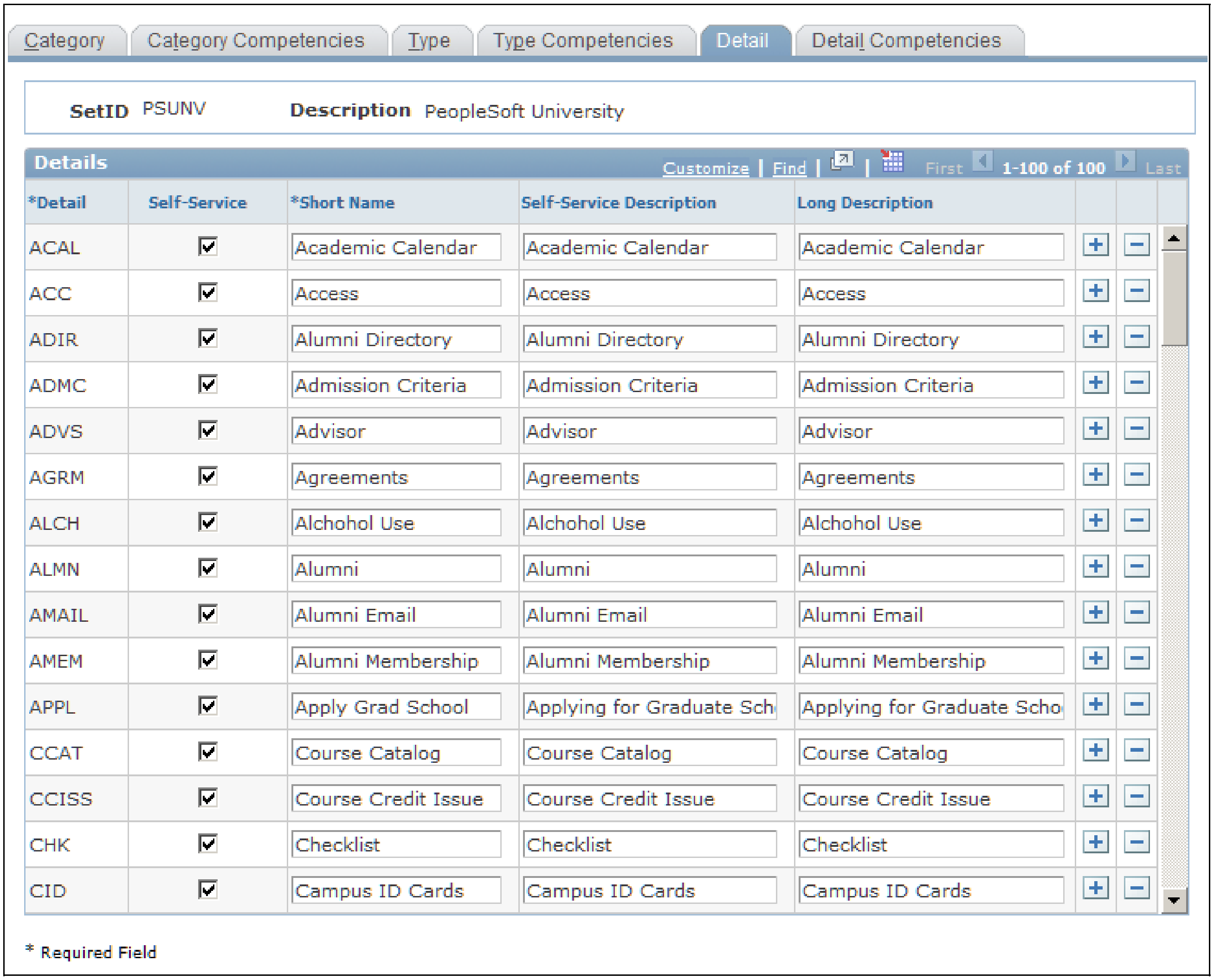
Description Select the competency needed to resolve problems for the displayed specialty type.

Minimum Level Select the minimum skill level that a person would need to resolve the problem for the selected competency.

Weight Select the level of importance that you want to assign to the competency. The system uses this weighting factor during the case assignment process to locate the best person available to resolve the problem.

Setting Up Case Details

Access the Detail page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail).


Category | Category Competencies | Type | Type Competencies | Detail | Detail Competencies

SetID PSUNV **Description** PeopleSoft University

Details Customize | Find | First 1-100 of 100 Last

*Detail	Self-Service	*Short Name	Self-Service Description	Long Description
ACAL	☑	Academic Calendar	Academic Calendar	Academic Calendar
ACC	☑	Access	Access	Access
ADIR	☑	Alumni Directory	Alumni Directory	Alumni Directory
ADMC	☑	Admission Criteria	Admission Criteria	Admission Criteria
ADVS	☑	Advisor	Advisor	Advisor
AGRM	☑	Agreements	Agreements	Agreements
ALCH	☑	Alchohol Use	Alchohol Use	Alchohol Use
ALMN	☑	Alumni	Alumni	Alumni
AMAIL	☑	Alumni Email	Alumni Email	Alumni Email
AMEM	☑	Alumni Membership	Alumni Membership	Alumni Membership
APPL	☑	Apply Grad School	Applying for Graduate Sch	Applying for Graduate Scho
CCAT	☑	Course Catalog	Course Catalog	Course Catalog
CCISS	☑	Course Credit Issue	Course Credit Issue	Course Credit Issue
CHK	☑	Checklist	Checklist	Checklist
CID	☑	Campus ID Cards	Campus ID Cards	Campus ID Cards

* Required Field

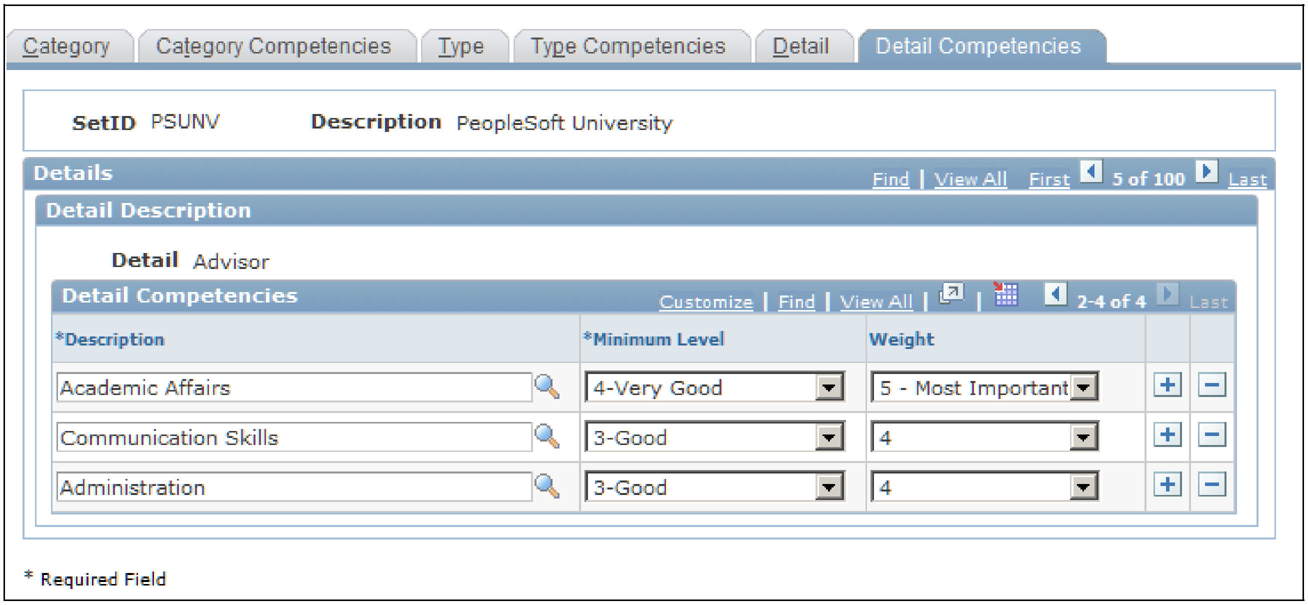
Detail page

To enter a new detail, click the Add a new row button. Enter a code in the Detail field, then enter descriptions in the Short Name, Self-Service Description, and Long Description fields.

Select the Self-Service check box if the detail will be used in the self-service application. Note that if Self-Service is not installed, the Self-Service check box and Self-Service Description, field will be hidden.

Setting Up Case Detail Competencies

Access the Detail Competencies page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail Competencies).



Detail Competencies page

Detail Competency Information

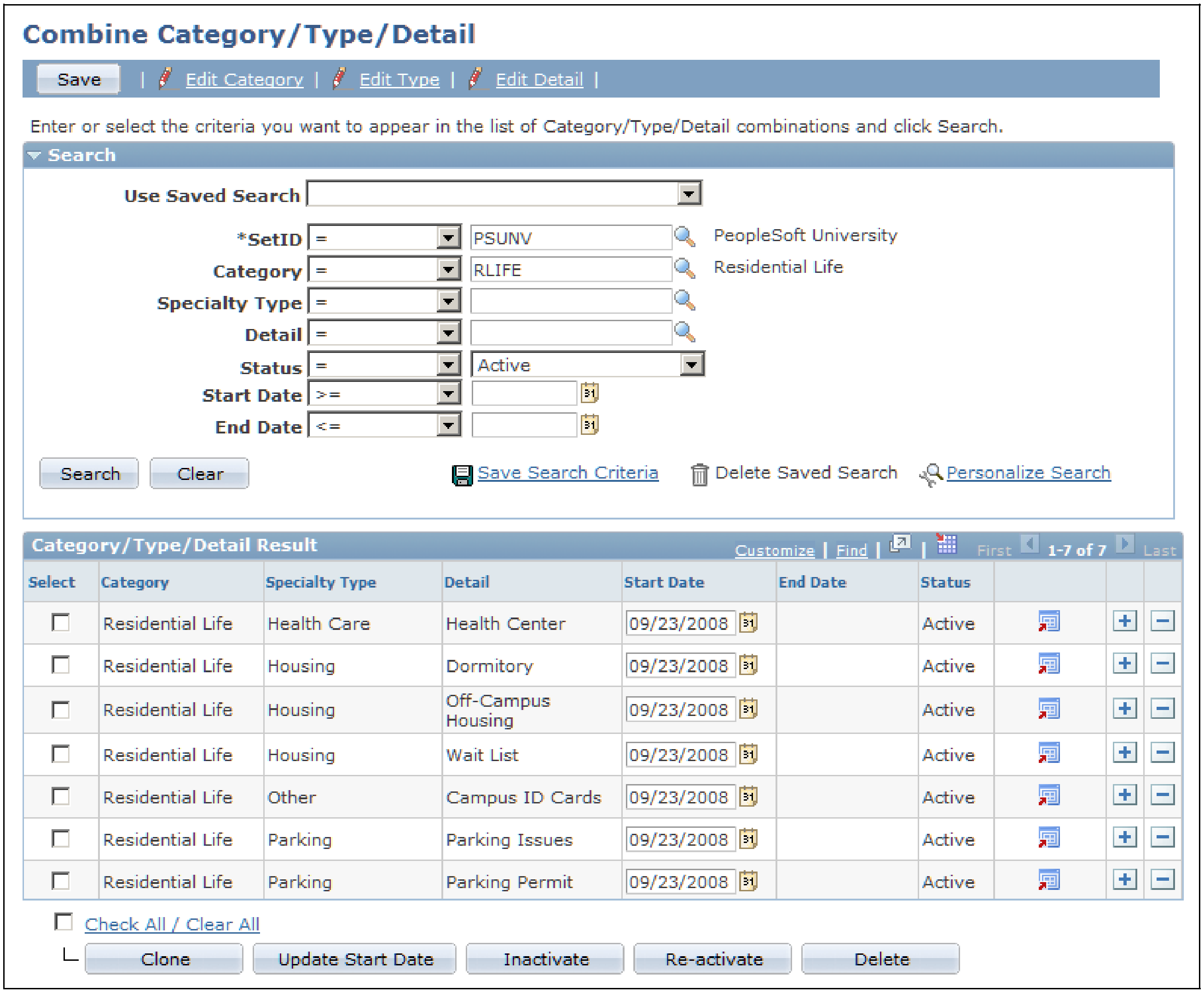
Description Select the competency needed to resolve problems for the displayed detail.

Minimum Level Select the minimum skill level that a person would need to resolve the problem for the selected competency.

Weight Select the level of importance that you want to assign to the competency. The system uses this weighting factor during the case assignment process to locate the best person available to resolve the problem.

Setting up Valid Category, Type and Detail Combinations

Access the Combine Category/Type/Detail page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Combine Category/Type/Detail).



Combine Category/Type/Detail page

Use this page to link specialty types and details to each desired category. When a user selects a category value on the case page, only the specialty type entries linked to that category will be available on the case page specialty type drop-down. Similarly, when a user selects a category and specialty type on the case page, only the details linked to those two fields will be displayed in the detail drop-down.

To search for existing combinations, enter your search criteria and click the Search button.

To enter a new combination, click the Add a new row button (the grid row button with a plus sign) within the Category/Type/Detail Result grid.

Search

Use Saved Search	Select a set of saved search criteria that you wish to execute.
Save Search Criteria	Click this link to name and save a set of search criteria for future use.
Delete Saved Search	Click this link to delete an existing saved set of search criteria.

Category/Type/Detail Result

Category Description

Select the category for which you wish to define valid specialty types and details

Specialty Type

Select a specialty type that you wish to make available for the specified category value.

Detail

Select a detail that you wish to make available for the specified category and specialty type values.

Start Date

Enter the start date on which the specified category, specialty type and detail value combination will become valid.

End Date

The date after which the specified category, specialty type and detail value combination will no longer be valid. Cases created after this date will no longer be able to use this combination. Users do not enter end dates directly into the grid: end dates are displayed after a user selects one or more rows and clicks the Inactivate button.

Status

Shows the status of a particular combination defined on a row in the grid. Users do not enter values for this field: the status value displayed is based on the start and end dates in effect for that row. Rows with a start date greater than the current date are considered to be in *Pending* status, indicating that these combinations are not yet available on cases. Rows with an end date less than the current date are considered to be in *Inactive* status, and are not available to new cases. Rows whose start date precedes the current date and whose end date is either blank or greater than the current date are considered *Active.*

 **(Competencies)**

Click this button to view the competencies for the category, specialty type and detail listed on the row.

Note. This button is only visible if there competencies exist for at least one of the category, specialty type or detail definitions listed in the search results.

Clone

Click this button to clone the selected row(s) from the grid. You will be prompted to select which field(s) you do not wish to have cloned from the specified source row(s), since you must specify at least one value on the new row that is different from the source row.

For example, users who wish to define multiple valid detail entries for a given category and specialty type may find it convenient to clone an existing row for that category and specialty type and simply add the desired detail value.

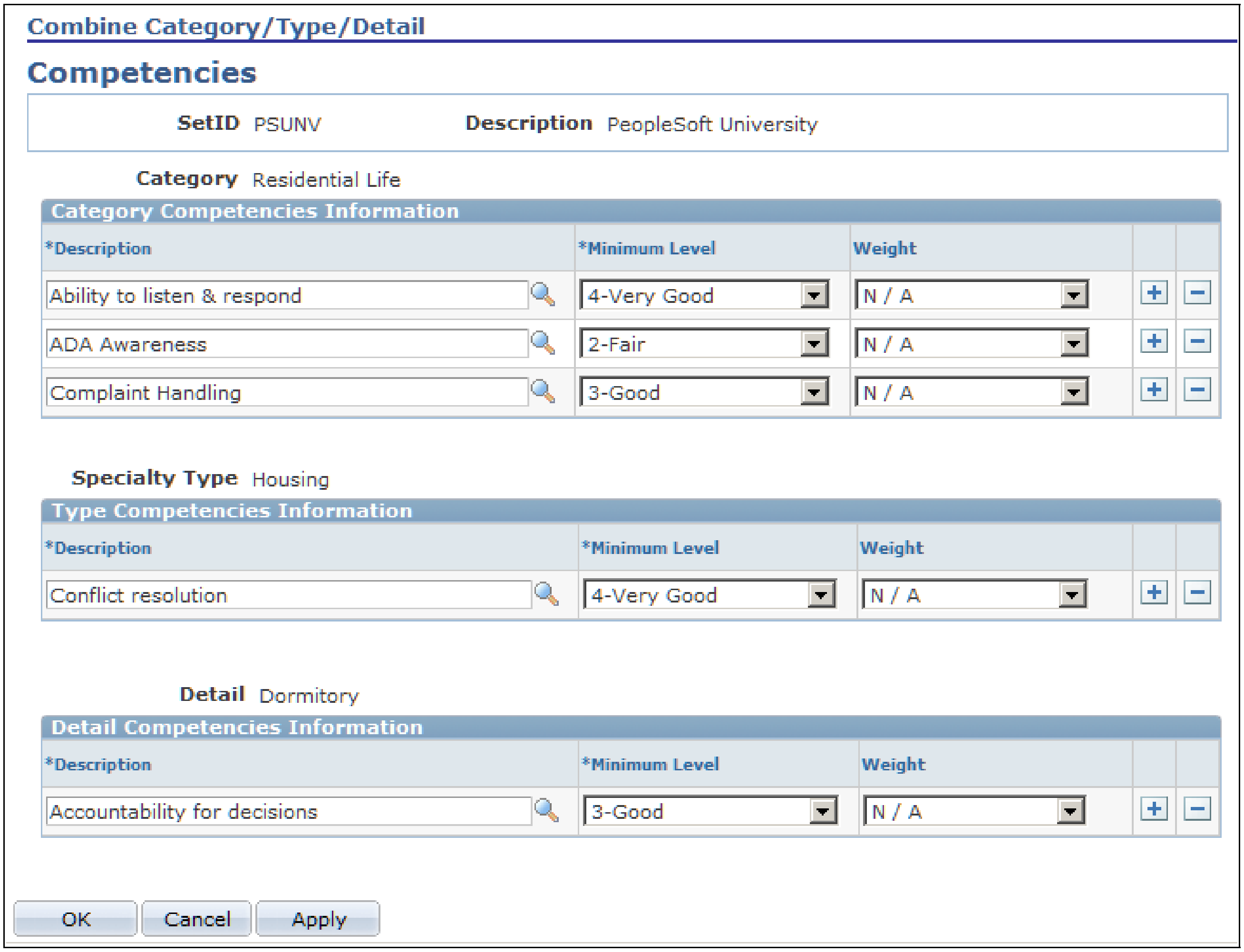
Update Start Date

Users may select multiple rows in the grid and update the valid start date for those rows by clicking this button and specifying the new desired start date.

Inactivate	Click this button to inactivate the selected row(s) from the grid. All selected rows will be given an end date equal to the current date, and the corresponding category, specialty type and detail combinations will no longer be available on cases opened after that date. Note that a combination cannot be inactivated if it is currently used by an open case, a case default, a quick code or an AAF policy action.
Reactivate	Click this button to reactivate the selected row(s) from the grid. All selected rows will be given a blank end date and a start date equal to the current date.
Delete	Use this button to delete the selected row(s) from the grid. A combination may not be deleted if it is currently used in an open case, a quick code, a business unit default, or an AAF policy action.

Combine Category/Type/Detail: Competencies

Access the Combine Category/Type/Detail: Competencies page (Set Up CRM, Product Related, Call Center, Category/Type/Detail, Combine Category/Type/Detail. Click the Competencies button for the desired Category/Type/Detail Result grid row.)



Combine Category/Type/Detail: Competencies page

Use this page to view or edit the competencies for the selected combination of category, specialty type, and detail.

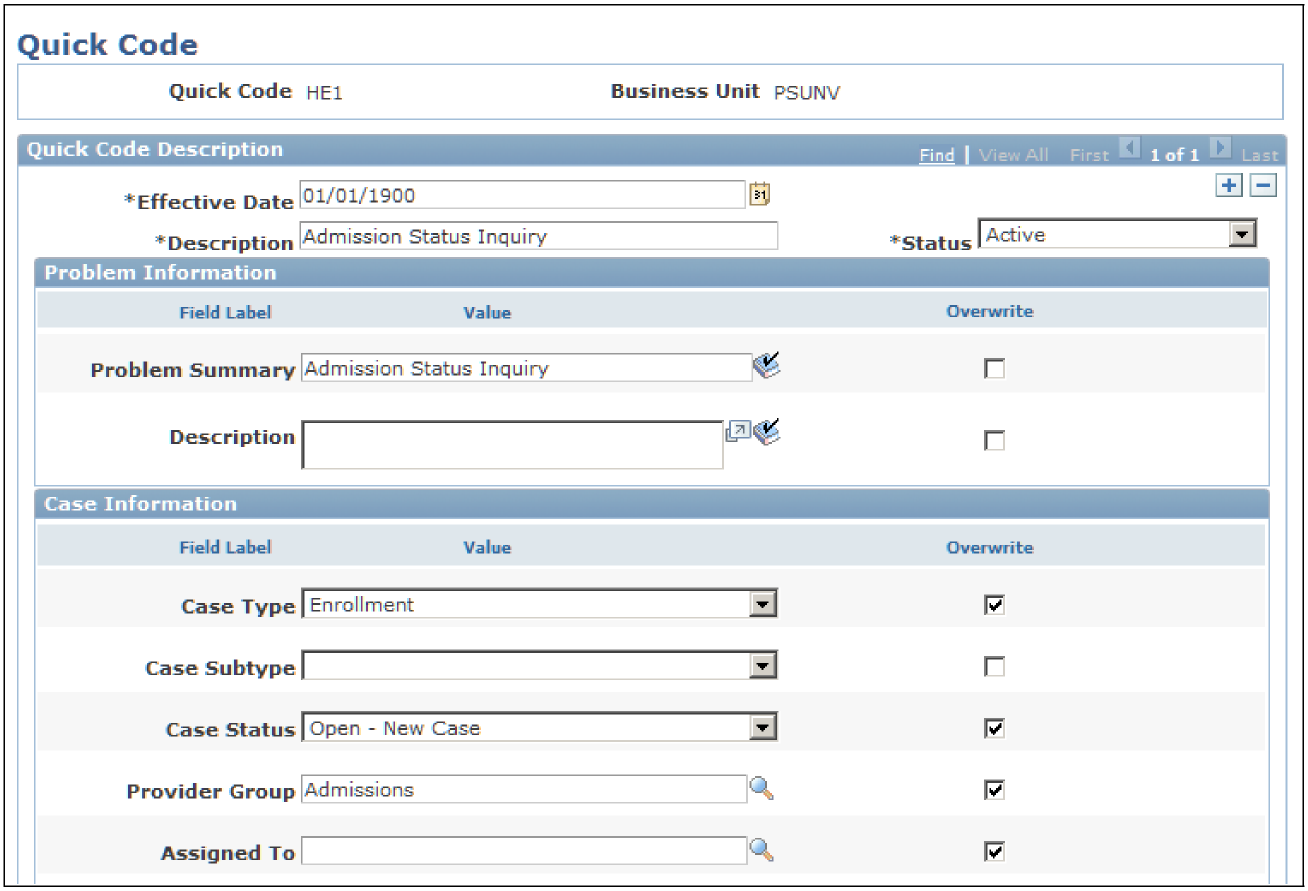
You may add or delete competencies associated to any entry shown on this page.

Note. Be aware that any changes made to the competency values for the category shown on this page will apply to all instances of that category, not just to the category, specialty type, and detail combination shown on the page. The same applies to any changes made to competency values made on this page for specialty types or details. Changes made on this page will apply in the same manner as changes made to the competency pages on the Category/Type/Detail component.

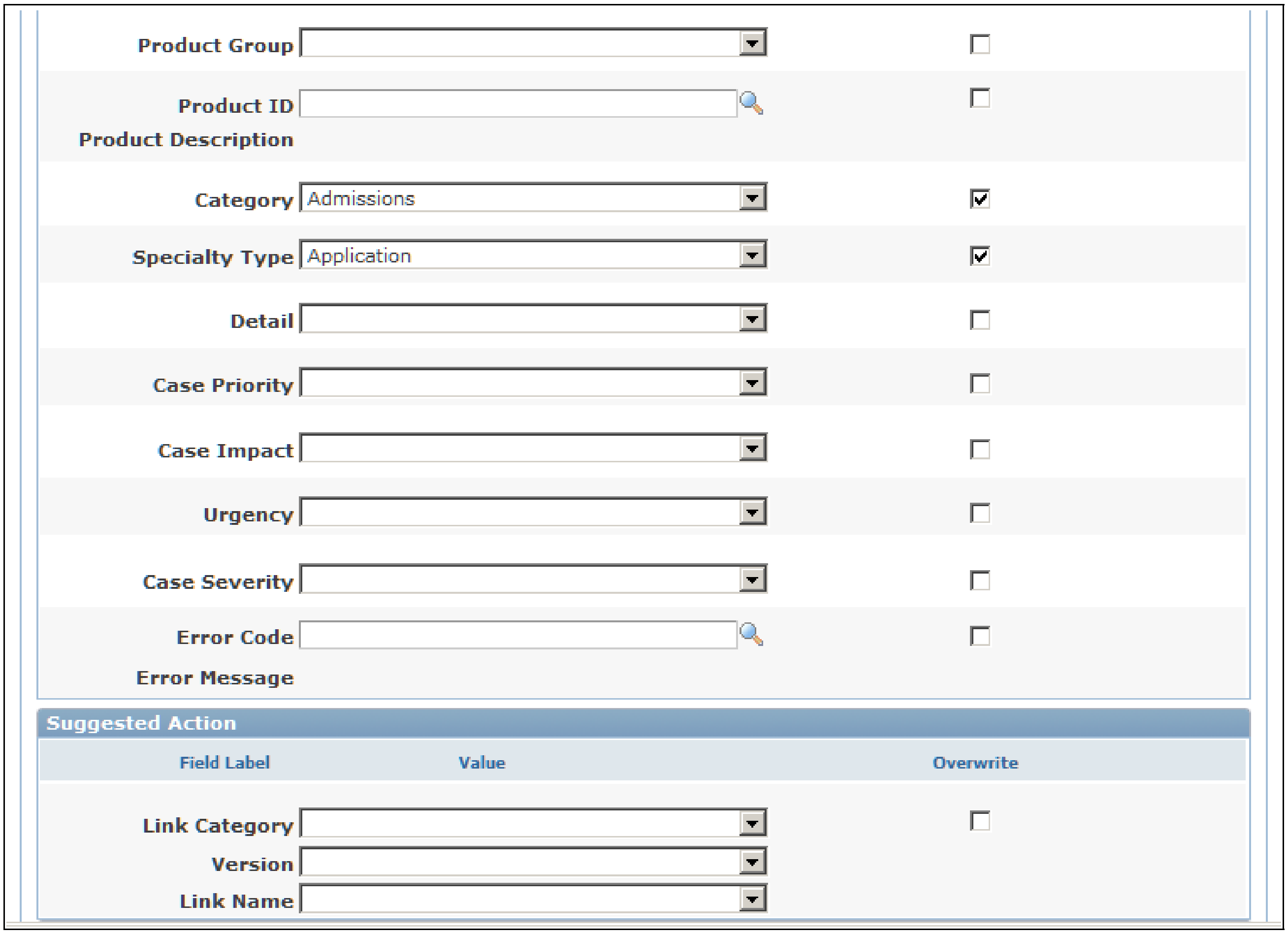
Setting Up Quick Codes

Access the Quick Code page (Set Up CRM, Product Related, Call Center, Quick Code, Quick Code).

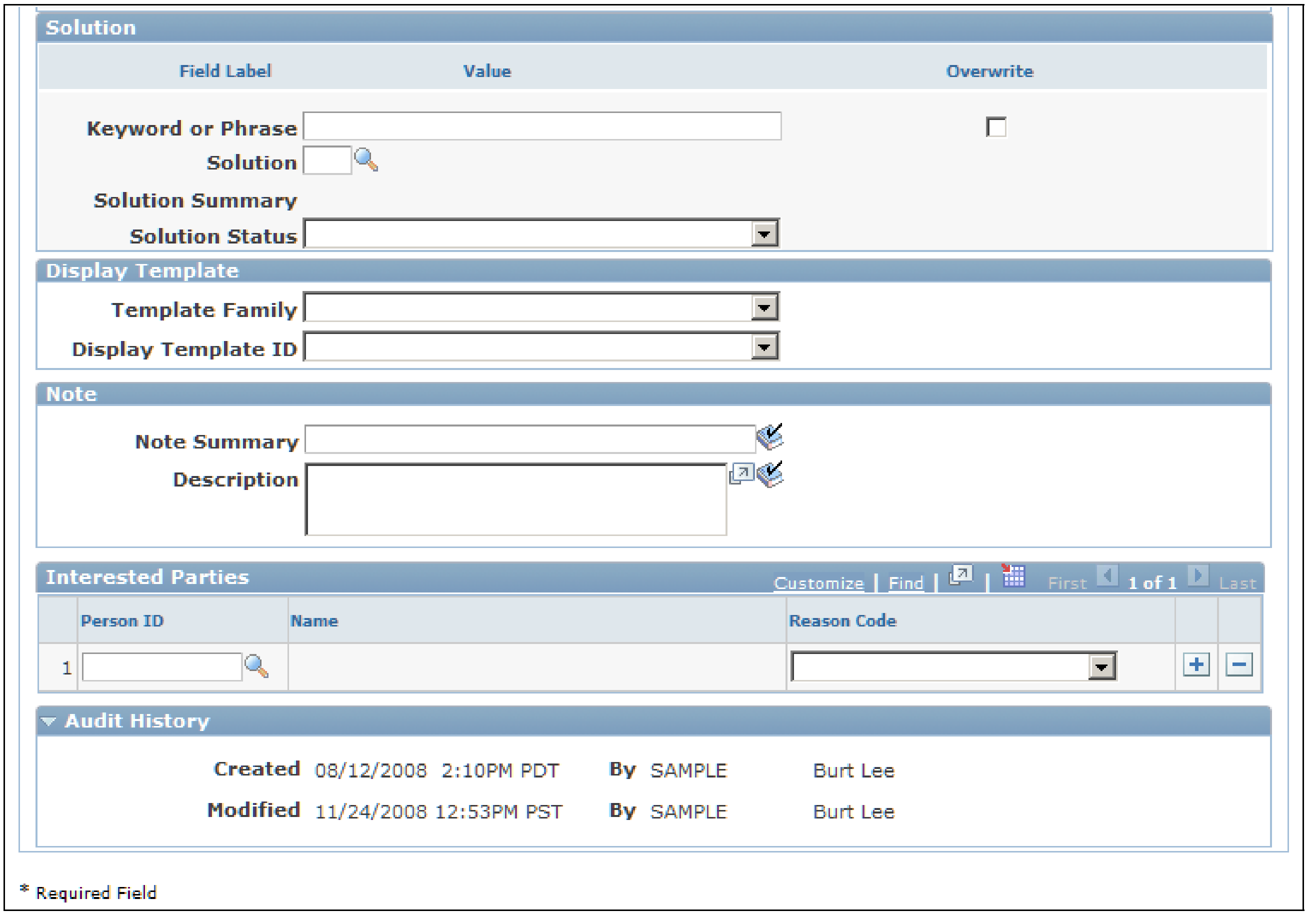
Note. You can use quick code to have the system suggest an action and to populate other fields on the Case page.



Quick Code page (1 of 3)



Quick Code page (2 of 3)



Quick Code page (3 of 3)

Quick Code This page displays a unique code that agents can use to populate multiple fields on the Case page automatically.

Business Unit Displays the business unit of the call center that uses this quick code.

Quick Code Description

Description Enter a short text description of the code. This description can be no longer than 20 characters.

Overwrite

Select the Overwrite check box if you want the system to overwrite the value for the same field on Case page when an agent selects the quick code for a case.

This table illustrates the use of the Overwrite check box using the Case Status field:

Value on Case Page	***Quick Code Value***	***Overwrite Check Box***	***After Quick Code is Selected***	***Explanation***
Blank	Open - Engineering	Selected	Open - Engineering	Quick code overwrites blank field.
Blank	Open - Engineering	Cleared	Open - Engineering	Quick code overwrites blank field even though Overwrite check box has not been selected.
Open - New	Open - Engineering	Selected	Open - Engineering	Quick code overwrites existing value in field as Overwrite check box is selected.
Open - New	Open - Engineering	Cleared	Open - New	Quick code does not overwrite existing value in field as Overwrite check box has not been selected.
Open - New	Blank	Selected	Blank	Quick code uses blank field values to overwrite existing value in field as Overwrite check box is selected.
Open - New	Blank	Cleared	Open - New	Quick code does not overwrite existing value in field as Overwrite check box has not been selected.

The Suggested Action fields have only one Overwrite check box for the three fields. Also, you cannot use the Overwrite check box for the Notes and Interested Parties grids.

Problem Information

When an agent enters a quick code, the system assigns the information in these fields to a case.

Problem Summary Enter the summary associated with this quick code.

Description Enter the description associated with this quick code.

Case Information

When an agent enters a quick code, the system assigns the information in these fields to a case.

Case Type Select the case type associated with this quick code.

Case Subtype Select the case subtype associated with this quick code.

Case Status Select the case status associated with this quick code.

Provider Group Select the provider group associated with this quick code.

Assigned To Select the agent to whom the case is to be assigned. If you've specified a provider group, you can select agents who are part of that group only.

Product ID Select the product ID associated with this quick code.

Category Select the category associated with this quick code.

Specialty Type Select the specialty type associated with this quick code.

Detail Select the detail associated with this quick code.

Case Priority Select the priority to be assigned to a case.

Case Impact Select the impact to be assigned to a case.

Urgency Select the urgency to be assigned to a case.

Case Severity Select the severity to be assigned to a case.

Error Code Select the error code to be assigned to a case.

Error Message Select the error message to be assigned to a case.

Suggested Actions

When an agent enters a quick code, the system assigns an action to the case.

Link Category Select the link category to be associated with a case.

Version Select the link category's version to be assigned to a case.

Link Name Select the link name to be associated with a case.

Solution

Keyword or Phrase Enter the keywords to be associated with a case. These keywords appear in the Search subtab on the Solutions page of the Case component, thus driving the search for solutions for the case.

Solution

Click to select a solution to be associated with this quick code. When this quick code is selected for a case, the chosen solution appears on the Attempted Solutions section on the Solutions page of the case.

Only solutions that share the same setID as the quick code are available for selection.

Note. When you select a solution for a quick code, you must also select a status for the solution. An error message appears if only one of these field has a value but not both.

Solution Summary

Displays the summary text of the selected solution.

Solution Status

Select the initial status for the solution to appear on the Solution page of the Case component. Values are:

Failed Resolution

In Consideration

Successful Resolution

Waiting on Customer

Withdrawn

Note. When you select a solution status, you must also select a solution to which the status applies. An error message appears if only one of these field has a value but not both.

See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*, "Using Solutions," Searching for Solutions.

Display Template

If you associate a display template to a quick code, selecting that quick code on a case will cause the case component to be shown using the associated display template ID.

Note. Cases retain the display template ID with which they were originally created. Therefore subsequent views of the case will be shown using the original display template for that case, not the display template associated with the quick code. However, a user could also create an AAF policy to change the display template used to view a case based on certain conditions, such as if a particular field has a certain value.

Display Template Family

Select the display template family to be associated with the quick code.

Display Template ID

Select the display template ID to be associated with the quick code. When the quick code is selected on a case, the case will be re-displayed using the quick code's display template ID (as long as the display template family of the case and the display template family of the quick code match).

Notes

When an agent enters a quick code, the system assigns the information in these fields to a case.

Summary Enter the notes summary to be associated to the case.

Description Enter the notes description to be associated to the case.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Interested Parties

When an agent enters a quick code, the system assigns the information in these fields to a case.

Interested Parties Select the interested parties to be associated with a case.

Reason Code Select the reason the interested party should be listed as an interested party on the case.

Setting Up Problem Codes for Material Returns

This section discusses how to set up problem codes for material returns.

Note. This section is relevant to PeopleSoft Support only. It is not applicable to the PeopleSoft HelpDesk, Quality Management, or Change Management applications.

See Also

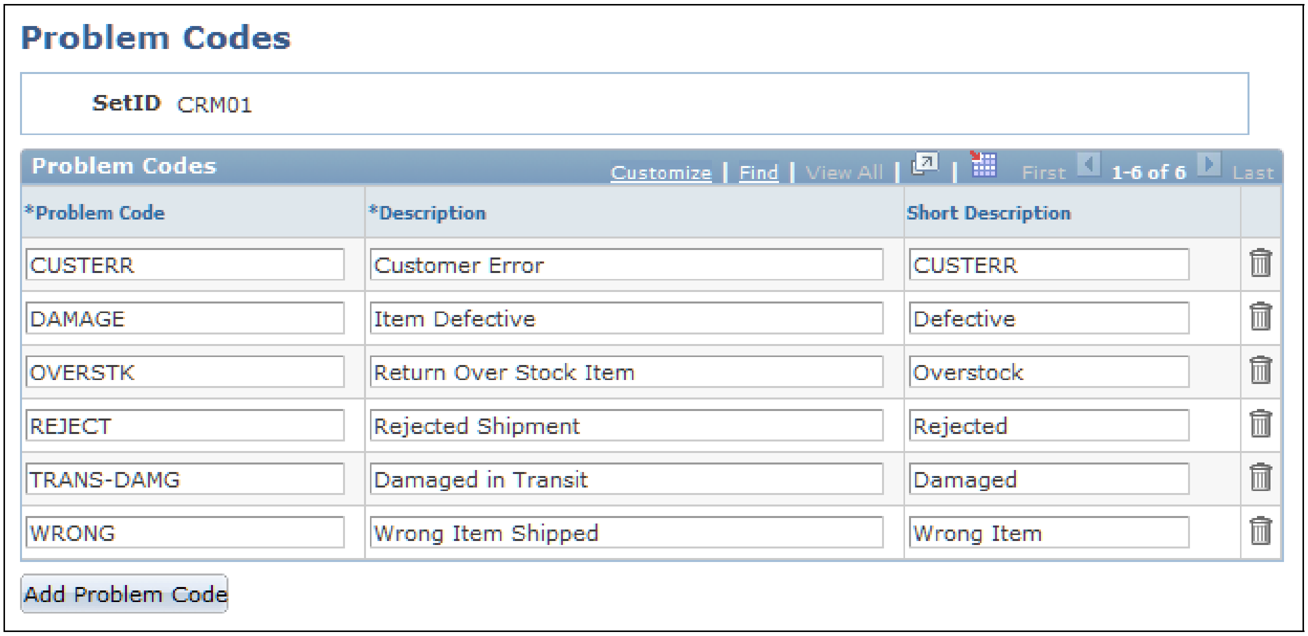
Chapter 14, "Managing Material Returns," Understanding Material Return Processing, page 381

Page Used to Set Up Problem Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Problem Codes	RF_PROBLEM_CD	Set Up CRM, Common Definitions, Codes and Auto Numbering, Problem Codes, Problem Codes	Set up the problem codes used to identify reasons for material returns on the RMA form.

Setting Up Problem Codes

Access the Problem Codes page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Problem Codes, Problem Codes).



Problem Codes page

If you integrate with PeopleSoft Inventory, the problem codes established on this page are used with RMAs and must match the reason codes that are established on the Reason Code page in PeopleSoft Inventory. In addition, the matching reason codes in PeopleSoft Inventory must be defined with a reason type of *Return Material Authorization.*

See *PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

Setting Up Reason Codes

This section discusses how to set up reason codes.

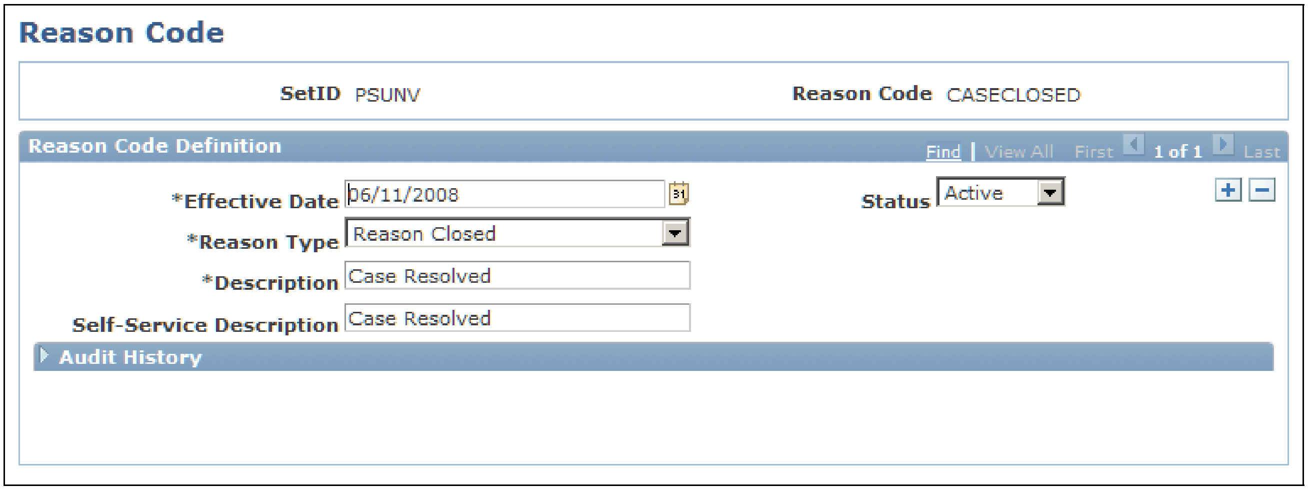
Page Used to Set Up Reason Codes

Page Name	*Definition Name*	*Navigation*	*Usage*
Reason Code	RB_REASON_CD	Set Up CRM, Common Definitions, Codes and Auto Numbering, Reason Codes, Reason Code	Create reason codes for various actions.

Setting Up Reason Codes

To set up reason codes, use the Reason Code (RB_REASON_CD) component.

Access the Reason Code page (Set Up CRM, Common Definitions, Codes and Auto Numbering, Reason Codes, Reason Code).



Reason Code page

Use the Effective Date and Status fields to make the reason code available to users. Select the Reason Type that you want the system to associate with the reason code that appears on the page. Enter more detailed descriptions for both agents and self-services users (if needed).

Setting Up Case Relationship Types and Labels

This section discusses how to set up case relationship types and labels.

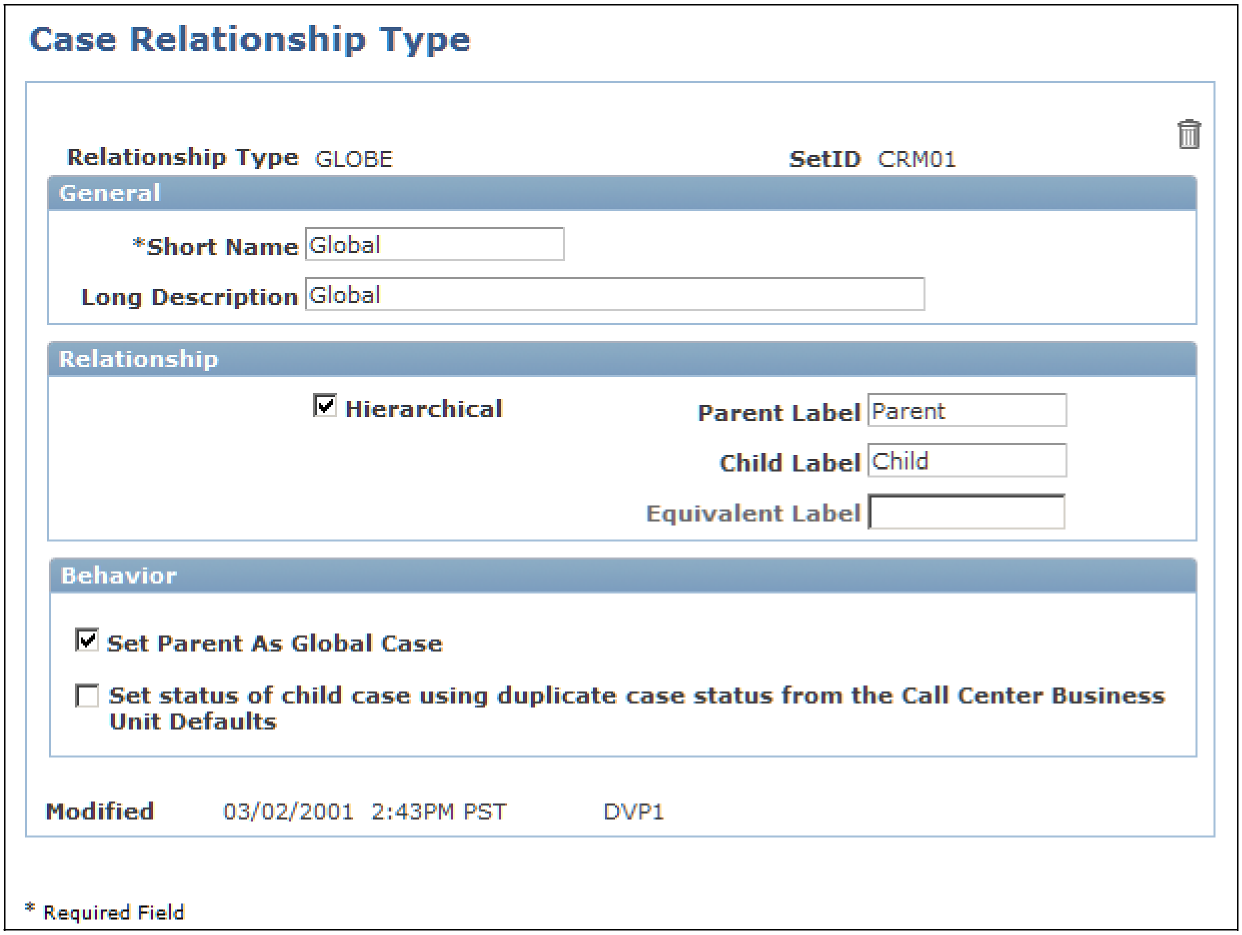
Page Used to Set Up Case Relationship Types and Labels

Page Name	*Definition Name*	*Navigation*	*Usage*
Case Relationship Type	RC_RELATION_TYPE	Set Up CRM, Product Related, Call Center, Case Relationship Type, Case Relationship Type	Set up types of case relationships and define the relationship labels that will appear on the Related Cases page.

Setting Up Case Relationship Types and Labels

To set up case relationship types and labels, use the Case Relationship Type (RC_RELATION_TYPE) component.

Access the Case Relationship Type page (Set Up CRM, Product Related, Call Center, Case Relationship Type, Case Relationship Type).



Case Relationship Type page

Relationship

Hierarchical

Select this check box if the relationship is hierarchical (a parent-child relationship). Clear this check box if the relationship is not hierarchical. Non-hierarchical relationships are also called equivalent relationships.

Parent Label and **Child Label**

If this is a hierarchical relationship, these fields control how the relationship is described on the Related Cases page. If you look at the child case, the Relationship field displays the child label; if you look at the parent case, the Relationship field displays the parent label.

You can enter information into these fields only if you select the Hierarchical check box.

Equivalent Label

If this is not a hierarchical relationship, this field controls how the relationship is described on the Related Cases page. If you look at either one of the related cases, the Relationship field displays the equivalent label.

You can enter information into this field only if you clear the Hierarchical check box.

Behavior

This page area will only be visible if the Hierarchical check box has been selected in the Relationship page area.

Set Parent as Global Case

When a case relationship is created, if the corresponding relationship type has this check box selected, then the Global Case check box will be automatically selected and updated on the parent case of the new relationship.

Set status of child case using Duplicate Case Status from the Business Unit Defaults

When a case relationship is created, if the relationship type has this check box selected, then the child case status will be automatically set to the Duplicate Case Status value specified in the Call Center Business Unit Defaults page.

Note. If this check box is selected but no Duplicate Case Status value has been specified on the Call Center Business Unit Defaults page, no automatic status update will be made on the child case.

Example

Consider a *Global* relationship type with a parent label of *Global Case* and a child label of *Ticket:*

- On the Related Cases page for the child case, the parent case appears in the Existing Related Cases grid.

  In that grid, the Type field value is *Global* and the Relationship field value is *Ticket.*
- On the Related Cases page for the parent case, the child case appears in the Existing Related Cases grid.

In that grid, the Type field value is still *Global,* but the Relationship field value is *Global Case.*

Setting up Case Matching Criteria

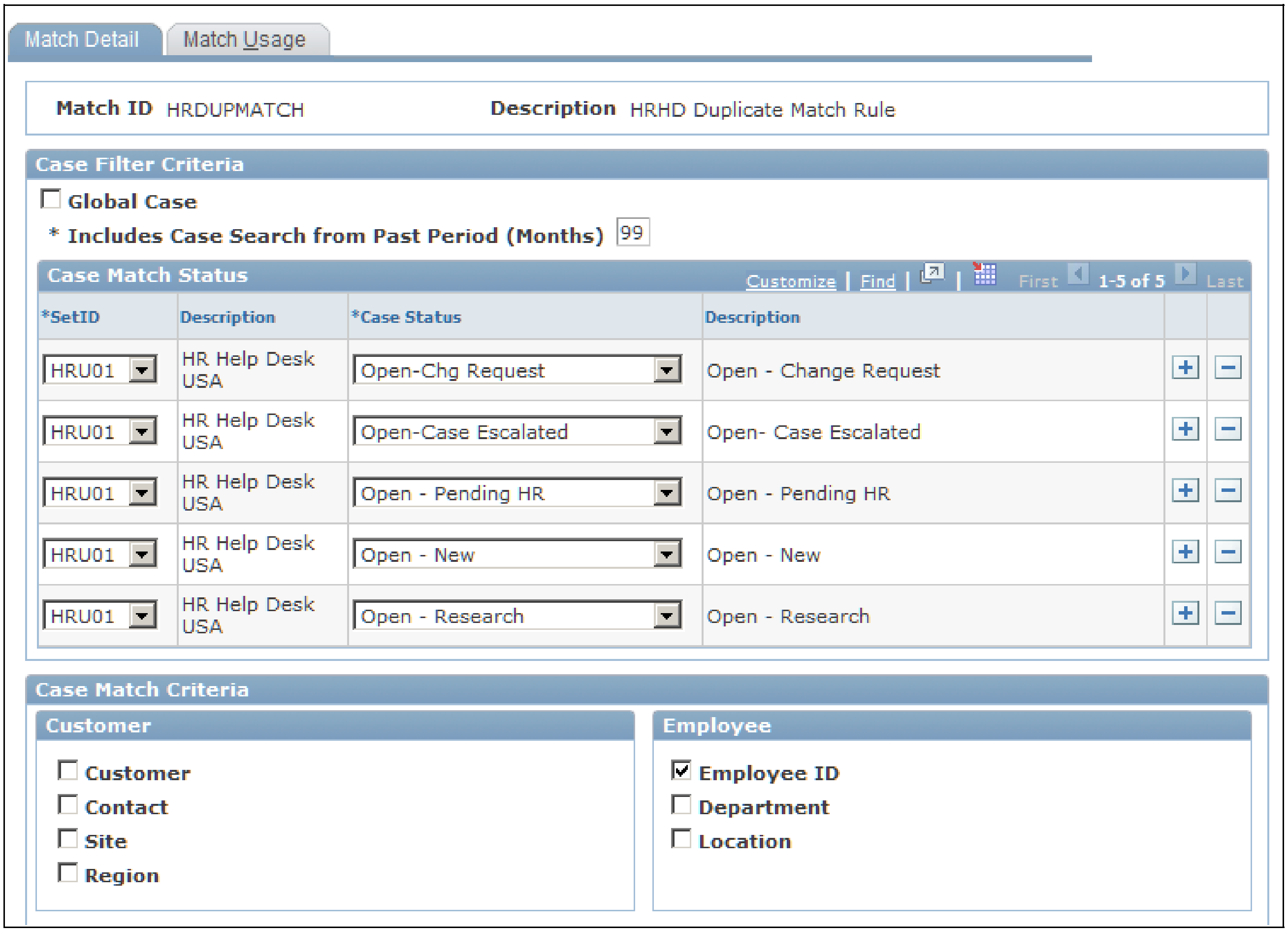
To set up case matching criteria, use the Case Match Definition (RC_CASE_MATCH) component.

Pages Used to Define Matching Criteria

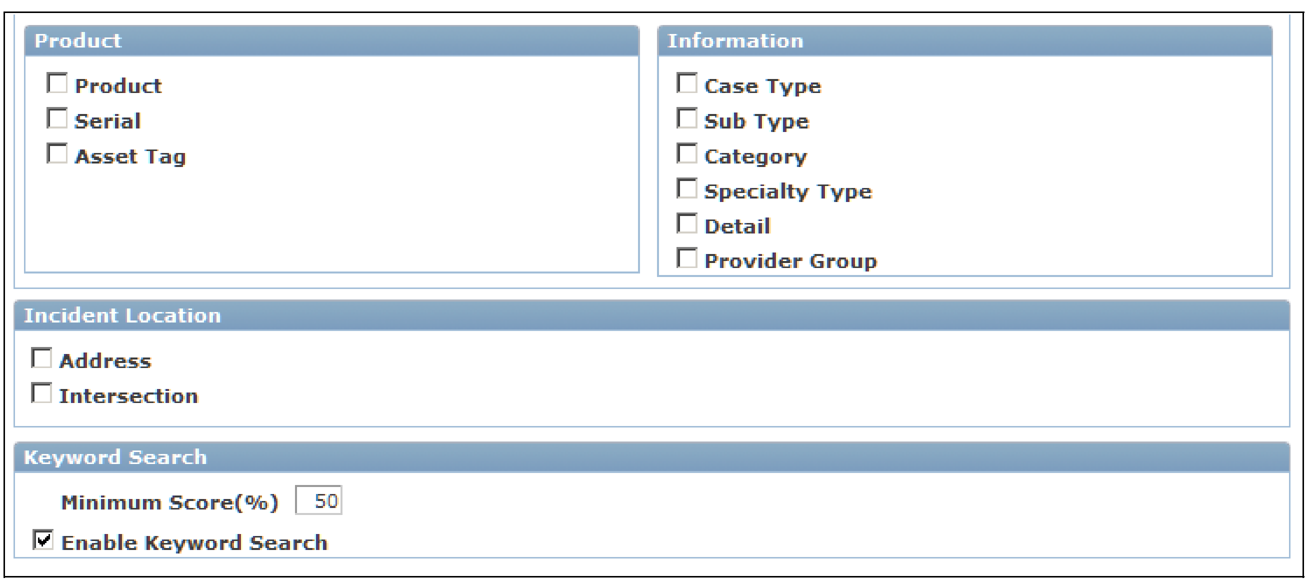
Page Name	*Definition Name*	*Navigation*	*Usage*
Match Definition	RC_MATCH_DETAIL	Set Up CRM, Product Related, Call Center, Case Match Definition, Match Detail	Specify the criteria to be used to match a case with other existing cases.
Match Usage	RC_MATCH_USAGE	Set Up CRM, Product Related, Call Center, Case Match Definition, Match Usage	Specify the business units and provider groups to which the match criteria should apply.

Setting Up Case Match Details

Access the Match Details page (Set Up CRM, Product Related, Call Center, Case Match Definition, Match Details)



Match Details page (1 of 2)



Match Details page (2 of 2)

Case Filter Criteria

Global Case Select this to restrict the match to include only cases whose Global Case check box has been selected.

Includes Case Search In Past Period (Months) Specify the number of months from case creation date to current date that should be considered when matching cases. A maximum value of *99* is allowed.

Case Match Status grid Indicate the SetID and case status to be used when the system looks for matching cases.

Case Match Criteria

Select the check boxes for all criteria that should apply when the system looks for matching cases.

Incident Location

Select the check boxes for all criteria that should apply when the system looks for matching cases.

Keyword Search

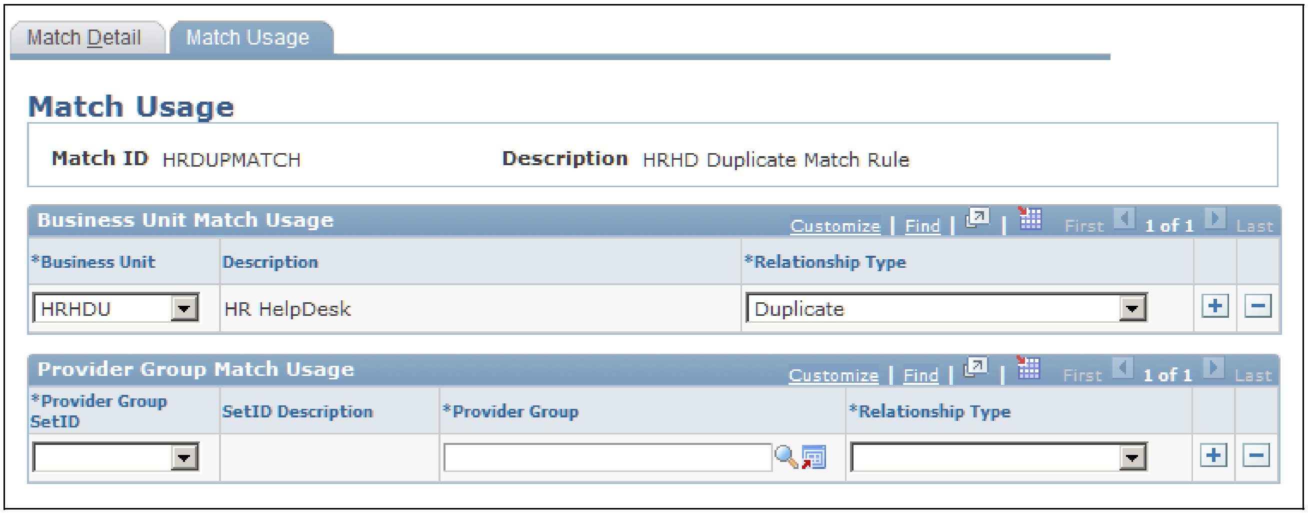
Minimum Score (%) The minimum score returned from the Verity Search to qualify a case as a match.

Enable Keyword Search Select this to enable key word searching from the case search collection. If this check box is selected, the system will search the case Summary and Case Detail field values from other cases to match the words in the Summary field of the case from which the search has been initiated.

Note. If this check box is selected, only cases that exceed or equal the minimum score are considered. These results must also meet all the other case match criteria specified on this page.

Setting Up Case Match Usage

Access the Match Usage page (Set Up CRM, Product Related, Call Center, Case Match Definition, Match Usage)



Match Usage page

Business Unit Match Coverage

Business Unit Specify the business unit for which this set of matching criteria (defined on the Match Definition page) should apply.

Relationship Type Select the relationship type that should be made available for the selected business unit when presenting case matches.

Provider Group Match Coverage

Provider Group SetID Specify the SetID of the associated provider group for which this set of matching criteria (defined on the Match Definition page) should apply.

Provider Group Name Specify the provider group for which this set of matching criteria (defined on the Match Definition page) should apply.

Relationship Type Select the relationship type that should be made available for the selected provider group when presenting case matches.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84.

When searching for case matches, if there is no provider group on the current case, the system will use the match criteria defined for the case business unit. If the current case has a provider group, then the system will use the match criteria defined for that provider group.

If the current case has a provider group but there is no match criteria defined for that provider group, then the system will use the match criteria defined for the business unit for that case.

Note. There is no limit to how many match definitions you can define for a business unit or provider group. However, the more match definitions you define, the more processing it will take to return your match results. For that reason, we recommend you minimize the number of match definitions you use.

Chapter 4

Setting Up RMA Processing

This chapter provides an overview of return material authorization (RMA) processing in PeopleSoft Support and discusses how to:

- Activate the required service operations
- Define items.
- Define defaults and procurement options for requisition processing.
- Define valid requisition requester IDs.
- Set up links to PeopleSoft Purchasing and PeopleSoft Inventory.
- Synchronize problem codes and reason codes.
- View RMA statuses.
- Process return-and-replace RMAs in PeopleSoft Supply Chain Management.

Note. This chapter is relevant to PeopleSoft Support only. PeopleSoft HelpDesk applications, PeopleSoft Change Management, and PeopleSoft Quality do not incorporate RMA functionality.

See Also

Chapter 14, "Managing Material Returns," page 381

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Checking Item Balances and Availability"

Understanding RMA in PeopleSoft Support

RMA functions and real-time item balance and availability checks in PeopleSoft Support require integration with inventory and purchasing systems. This chapter discusses implementation requirements and recommendations to consider when integrating PeopleSoft Support with PeopleSoft Inventory and PeopleSoft Purchasing in the PeopleSoft Supply Chain Management (SCM) product line.

Note. You must implement the Business Unit EIP to make business units defined in PeopleSoft SCM available for selection on pages in PeopleSoft Support.

Activating the Required Service Operations

The implementation of RMA functionality in PeopleSoft Support requires activation of the following service operations:

- Business Unit.
- Item Master.
- Customer.
- Product.
- Return Material Authorization.
- Purchase Order Requisition.
- Item Balance.

As delivered, PeopleSoft service operation queues are inactive. In the PeopleSoft CRM and PeopleSoft Supply Chain Management (SCM) systems, you must activate the required service operation, set the associated service operation queues to run mode, define the publication or subscription routing rules, and configure an existing message node or define a new one.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Testing Utilities and Tools

Defining Items

Item information in PeopleSoft CRM must be synchronized with item information in PeopleSoft SCM. Although PeopleSoft CRM pages enable you to enter item information manually in PeopleSoft CRM, use the Item Master service operation to populate item tables in PeopleSoft CRM with the master item data in PeopleSoft SCM.

Once you activate the Item Master service operation, however, you can use the pages of the Item Definition component in PeopleSoft CRM to view item information only. You cannot add or update item definitions in PeopleSoft CRM.

As delivered, PeopleSoft service operations are inactive. In both your PeopleSoft CRM and PeopleSoft SCM systems, you must activate the required service operations of the Item Master, set the associated service operation queues to run mode, define the routing rules, and configure an existing message node or define a new message node.

PeopleSoft CRM stores only a subset of the item attributes defined in PeopleSoft SCM—only the item attributes that are used in PeopleSoft CRM are synchronized. To view the complete item definition, use the item definition components in PeopleSoft SCM.

Item definitions in PeopleSoft CRM are stored at the setID level only. Therefore, it is possible for a particular item to have a status of *Active* at the setID level but a status of *Inactive* in any of the business units in which the item is defined.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Defining Items"

Defining Defaults and Procurement Options for Requisition Processing

Call center business units in PeopleSoft CRM that can create RMAs must be defined as valid sources of requisitions in PeopleSoft SCM. Using the Requisition Loader Defaults component in PeopleSoft SCM, you define each call center business unit as a loader business unit and establish processing defaults for requisitions staged by the call center business unit, including the purchasing business unit in PeopleSoft Purchasing that processes the requisitions.

See *PeopleSoft Enterprise Purchasing PeopleBook.*

When defining procurement options in PeopleSoft SCM, you can associate the call center business unit with an appropriate distribution network on the Ship To Locations page. You can configure sourcing processes in PeopleSoft Purchasing to check available quantity first in the distribution network before creating a purchase order with an external vendor.

If quantity exists in one of the Inventory business units in the defined distribution network, a material stock request is created to fulfill the requisition. Do not include in distribution networks any Inventory business units representing field service trucks.

See *PeopleSoft Enterprise Inventory PeopleBook.*

Note. You must implement the Business Unit service operation to make business units defined in PeopleSoft Support available for selection on pages in PeopleSoft SCM.

See *PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials).*

Defining Valid Requisition Requester IDs

Every requisition generated in PeopleSoft CRM includes a requester ID, representing the person or entity that initiates a requisition request. For requisitions initiated from the RMA Form component (RF_RMA), the system populates the Requester field with the default requester ID defined on the User Preferences - Overall Preferences page.

You can select an alternate requester ID as necessary; however, you must define the requester ID on requisitions staged in PeopleSoft Purchasing as a valid requester ID in PeopleSoft SCM. You establish requesters on the Requester Setup page in PeopleSoft SCM.

See *PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

You can set up requester IDs that are associated with multiple user IDs. In this case, a requester ID represents a specific group or region. Setting up requester IDs in this manner enables you to monitor requisitions staged by the associated group or region rather than by a specific person in the Requisition Workbench component (REQ_WORKBENCH) in PeopleSoft Purchasing.

Note. For requisitions initiated for advanced return RMAs in PeopleSoft Support, the system sets the requisition ID equal to the RMA ID. RMA IDs are limited to 10 digits.

See *PeopleSoft Enterprise Purchasing PeopleBook.*

Setting Up Links to PeopleSoft Purchasing and PeopleSoft Inventory

PeopleSoft uses content references that point to the ERP node on the Employee portal. Assuming the ERP node is available, no setup is required to access the Requisition Workbench component in PeopleSoft Purchasing and the Item/Product Availability Inquiry component (ATP_AVAIL_INV) in PeopleSoft Inventory when using the RMA Form component within the portal in the FDM database.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Testing Utilities and Tools

Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology

Synchronizing Problem Codes and Reason Codes

When creating an RMA in PeopleSoft Support, you must specify a problem code. You set up problem codes for RMAs on the Problem Codes page under Set Up CRM, Common Definitions, Codes and Auto Numbering. If you are integrating with PeopleSoft Inventory, the problem codes for RMAs in PeopleSoft Support must match the reason codes established on the Reason Code page in PeopleSoft Inventory.

In addition, you must define the matching reason codes in PeopleSoft Inventory with a reason type of *Return Material Authorization.* When you create the RMA form in PeopleSoft Inventory, the problem code is used as the reason code. If the reason code on the RMA form does not exist in PeopleSoft Inventory, the system logs an error when the Returned Material Authorization EIP application message is processed.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," page 51

PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)

Viewing RMA Statuses

The RMA status field is included on the RMA record in PeopleSoft Support. However, the RMA status field does not appear on the pages in the RMA Form component because the RMA status in PeopleSoft Support is not updated by PeopleSoft Inventory.

If your implementation includes PeopleSoft Inventory and you have logged on to the portal using the single sign-on feature, click View Status in the RMA Form component in PeopleSoft Support to access PeopleSoft Inventory's RMA Form page. On the RMA Form page in PeopleSoft Inventory, you can check the status of the RMA. The View Status link is disabled in Add mode.

Processing Return-and-Replace RMAs in PeopleSoft Supply Chain Management

Orders for return-and-replace RMAs are not created until the returned material has been physically received at the specified return-to-inventory business unit. When a person records receipt of material on a return-and-replace RMA in PeopleSoft Inventory, the system displays a message indicating that a replacement order is required.

Depending on your business process rules, the person enters a material stock request in PeopleSoft Inventory or a requisition in PeopleSoft Purchasing to replace the customer's returned material.

The person receiving the returned material uses the information on the RMA, such as the customer's address and information about the item and quantity returned, to create the replacement order. To facilitate tracking, the replacement order in PeopleSoft Inventory or PeopleSoft Purchasing, you should create the replacement requisitions or material stock requests using the same ID as the RMA.

See *PeopleSoft Enterprise Inventory PeopleBook.*

Chapter 5

Setting Up Links and Related Actions

This chapter provides an overview of link setup and discusses how to:

- Set up content references.
- View and modify link definitions.

Understanding Link Setup

This section discusses:

- Basic link setup.
- Link presentation on the Case page.
- Link groups delivered by the PeopleSoft system.
- Link categories delivered by the PeopleSoft system.
- Link definitions delivered by the PeopleSoft System (content references).
- Link definitions for PeopleSoft Customer Relationship Management (CRM).

Basic Link Setup

The PeopleSoft system uses links to provide users with the ability to link to other PeopleSoft pages from the Case page. You can also provide users with the ability to relate actions to cases.

The PeopleSoft system provides a standard method to link to PeopleSoft pages from the Case page in PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources. To enable you to add and remove links with little or no configuration, the PeopleSoft system provides system-delivered data for content references, link categories, link definitions, and link groups.

To link to an action from the Case page, you must have a valid:

1. Link group.

   Define the appropriate link group to the display template. A link group definition is a grid that is comprised of rows of link categories and associated link names.

2. Link category.

   A category can have multiple versions, each associated with a different target system (for example, PeopleSoft HCM 9.0, PeopleSoft HCM 8.9, and so on). However, only one version of a category can be active at any time.

3. Link definitions.

   Associate a link name to a link category. For each link definition, you must identify the values that will be transferred to the key fields of the target page.

Link Setup for PeopleSoft HelpDesk for Human Resources Users

For users of PeopleSoft HelpDesk for Human Resources, this linking method enables you to run PeopleSoft HRMS on multiple databases using multiple PeopleSoft HRMS versions. It also enables you to link to an Oracle E-Business HRMS database. For security considerations when linking from a PeopleSoft HelpDesk for Human Resources case to PeopleSoft or E-Business HRMS, you must also:

- Set up a node for each database server.

  Note. For this setup to work, the system needs to know the name of the database and the application server for that database. You must set up the Content URL Text for the PeopleSoft or E-Business HRMS node per your environment.

- Set up user IDs for both PeopleSoft or E-Business HRMS and PeopleSoft CRM.
- Set up single signon.

  See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*.

- Set up portal content references and security for each target page in PeopleSoft or E-Business HRMS.

  Note. The availability of a link is security-defined for the content reference. You must set up security that matches the security for the target page. If a mismatch occurs, users receive an error message when they attempt to access the page.

Link Presentation on the Case Page

After links are set up, the link categories appear in the Actions group box on the Case page. A user can view a subset of links based on the security established for the content reference in the link definition. If the user does not have access to any link definitions within a category, the category does not appear. This security is different from the security established for the target page in PeopleSoft HCM. The group box can accommodate multiple link categories.

The group box displays:

- The link category name.
- A drop-down list box per link category for the user to specify a specific link within the category.
- A Go button.

After you select a specific link name and click the Go button, the system opens a new browser window with the target page.

Note. If the parameters are not sufficient to get access to the *target* page, the target's search page appears.

Link Groups Delivered by the PeopleSoft System

This table lists the link groups delivered by the PeopleSoft system:

Link Group ID	***Description***
COM	Communications
ENG	Energy
FIN	Financials
GOV	Government
HDREL	HelpDesk Related Actions
HE	Higher Education Actions
HEIT	Higher Education IT Actions
HESPT	Higher Education Support
HITEC	Hi-Technology
HREBS	HR HelpDesk EBS
HRMS	HR HelpDesk
INS	Insurance
SPRT	Support Related Actions

Link Categories Delivered by the PeopleSoft

This table lists the link categories delivered by the PeopleSoft system:

Link Category	*Link Version*	*Action Flag*	*Long Description*	*Description*
ACAD	9.1	Active	Academics	Academic
ADM	9.1	Active	Admissions	Admission
BENEF	8.O SP1	Inactive	Benefits	Benefits
BENEF	8.3	Inactive	Benefits	Benefits
BENEF	8.8	Inactive	Benefits	Benefits
BENEF	8.9	Inactive	Benefits	Benefits
BENEF	9.0	Inactive	Benefits	Benefits
BENEF	9.1	Active	Benefits	Benefits
CR	9.1	Active	Contributor Relations	Contributor Relation
CS	9.1	Active	Campus Community	Campus Community
EBABS	12.1	Active	Absences	Absences
EBASN	12.1	Active	Assignment	Assignment
EBCMP	12.1	Active	Manage Benefits	Manage Benefits
EBHR	12.1	Active	Personal	Personal
EBMWK	12.1	Active	Maintain Worker	Maintain Worker
EBPAY	12.1	Active	Manage Payroll	Manage Payroll
EBPUK	12.1	Active	Tax and Statutory	Tax and Statutory
FIN	9.1	Active	Financials	Financial

Link Category	***Link Version***	***Action Flag***	***Long Description***	***Description***
HRMS	8.O SP1	Inactive	HRMS	Human Resources
HRMS	8.3	Inactive	HRMS	Human Resources
HRMS	8.8	Inactive	HRMS	Human Resources
HRMS	8.9	Inactive	HRMS	Human Resources
HRMS	9.0	Inactive	HRMS	Human Resources
HRMS	9.1	Active	HRMS	Human Resources
PAYR	8.0 SP1	Inactive	Payroll	Payroll
PAYR	8.3	Inactive	Payroll	Payroll
PAYR	8.8	Inactive	Payroll	Payroll
PAYR	8.9	Inactive	Payroll	Payroll
PAYR	9.0	Inactive	Payroll	Payroll
PAYR	9.1	Active	Payroll	Payroll
RELA	Other	Active	Related Actions	Related Actions
SACT	Other	Active	Suggested Actions	Suggested Actions
STOCK	8.O SP1	Inactive	Stock	Stock
STOCK	8.3	Inactive	Stock	Stock
STOCK	8.8	Inactive	Stock	Stock
STOCK	8.9	Inactive	Stock	Stock

Link Category	Link Version	Action Flag	Long Description	Description
STOCK	9.0	Inactive	Stock	Stock
STOCK	9.1	Active	Stock	Stock
TRNG	8.O SP1	Inactive	Training	Training
TRNG	8.3	Inactive	Training	Training
TRNG	8.8	Inactive	Training	Training
TRNG	8.9	Inactive	Training	Training
TRNG	9.0	Inactive	Training	Training
TRNG	9.1	Active	Training	Training

Link Definitions Delivered by the PeopleSoft System (Content References)

This section lists the link definitions that are delivered by the PeopleSoft system.

Note. If you licensed PeopleSoft Benefits Administration, you can access both PeopleSoft Benefits Administration links and Manage Base Benefits links. If you licensed Manage Base Benefits only, you will not have access to PeopleSoft Benefits Administration links. Manage Base Benefits links include all PeopleSoft Benefits Administration links except Election Entry and Create Event. If you have not licensed PeopleSoft Benefits Administration, you should delete all of the delivered PeopleSoft Benefits Administration links except Election Entry and Create Event from the Link Definition page.

Link Definitions for PeopleSoft HCM 9.1

This table lists the link definitions delivered by the PeopleSoft system for PeopleSoft HCM, version 9.1:

Note. This data is delivered with the Active Flag set to *Active.*

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BN_ENRL_SUMMARY	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ALLOCATION_GBL	CAR_ALLOCATION	EMPLID
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_GBL	CAR_PLAN	EMPLID
BENEF	DEBEN	Dependent/Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANSA_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID

Category	*Link Name*	*Short Name*	*Content Reference*	*Page Name*	*Search Key*
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMM_GBL7	WF_JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	LNMGB	Maintain Loans – GBR	HC_GPGB_EE_LOANS_GBL	GPGB_EE_LOAN_DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_LOAN_RV_GBL	GPGB_EE_LOAN_RV	EMPLID
PAYR	LONFR	Request Loans - FRA	HC_GPFR_LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ONPAY_GBL	GPFR_ONPAY_SUM	EMPLID
PAYR	PAYGB	Payslip - GBR	HC_GPGB_PSLIP_PU_PNLG_GBL	GPGB_PSLIP_PU	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINES	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINES	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINES	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 9.0

This table lists the link definitions delivered by the PeopleSoft system for PeopleSoft HCM, version 9.0:

Note. This data is delivered with the Active Flag set to *Inactive.*

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BENEFITS_SUMMARY1	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ALLOCATION_GBL	CAR_ALLOCATION	EMPLID
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_GBL	CAR_PLAN	EMPLID
BENEF	DEBEN	Dependent/Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANSA_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	LNMGB	Maintain Loans – GBR	HC_GPGB_EE_LOANS_GBL	GPGB_EE_LOAN_DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_LOAN_RV_GBL	GPGB_EE_LOAN_RV	EMPLID
PAYR	LONFR	Request Loans - FRA	HC_GPFR_LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ONPAY_GBL	GPFR_ONPAY_SUM	EMPLID
PAYR	PAYGB	Payslip - GBR	HC_GPGB_PSLIP_PU_PNLG_GBL	GPGB_PSLIP_PU	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 8.9

This table lists the link definitions delivered by the PeopleSoft system for PeopleSoft HCM, version 8.9:

Note. This data is delivered with the Active Flag set to *Inactive.*

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BENEFITS_SUMMARY1	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ALLOCATION_GBL	CAR_ALLOCATION	EMPLID
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_GBL	CAR_PLAN	EMPLID
BENEF	DEBEN	Dependent/Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS_CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANSA_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID

Category	*Link Name*	*Short Name*	*Content Reference*	*Page Name*	*Search Key*
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	LNMGB	Maintain Loans – GBR	HC_GPGB_EE_LOANS_GBL	GPGB_EE_LOAN_DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_LOAN_RV_GBL	GPGB_EE_LOAN_RV	EMPLID
PAYR	LONFR	Request Loans - FRA	HC_GPFR_LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ONPAY_GBL	GPFR_ONPAY_SUM	EMPLID
PAYR	PAYGB	Payslip - GBR	HC_GPGB_PSLIP_PU_PNLG_GBL	GPGB_PSLIP_PU	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 8.8

This table lists the link definitions delivered by the PeopleSoft system for PeopleSoft HCM, version 8.8:

Note. This data is delivered with the Active Flag set to *Inactive.*

Category	*Link Name*	*Short Name*	*Content Reference*	*Page Name*	*Search Key*
BENEF	BENE	Election Entry	HC_BAS_ELECTIO N_ENTRY_GBL	BAS_ELECT_EVEN T	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SU MMARY_GBL9	BENEFITS_SUMMA RY1	EMPLID
BENEF	DEBEN	Dependent/Benefi ciaries	HC_DEPEND_BENE F_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_B ENEFIT_GBL	DISABILITY_BENE FIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_ EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS _CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS _GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENE FITS_GBL4	HEALTH_BENEFIT S1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BE NEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS _GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS A_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_P LANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLA N_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLA NS_GBL	RTRMNT_PLANS	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINES	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 8.3

This table lists the link definitions delivered by the PeopleSoft system for PeopleSoft HCM, version 8.3:

Note. This data is delivered with the Active Flag set to *Inactive.*

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
BENEF	BENE	Election Entry	HC_BAS_ELECTIO N_ENTRY_GBL	BAS_ELECT_EVEN T 1	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SU MMARY_GBL9	BENEFITS_SUMMA RY1	EMPLID
BENEF	DEBEN	Dependent/Benefic iaries	HC_DEPEND_BENE F_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_B ENEFIT_GBL	DISABILITY_BENE FIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_ EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS _CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS _GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENE FITS_GBL4	HEALTH_BENEFIT S1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BE NEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS _GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS A_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_P LANS_GBL	PENSION_PLAN1	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID

Category	*Link Name*	*Short Name*	*Content Reference*	*Page Name*	*Search Key*
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_ADD_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID

Category	*Link Name*	*Short Name*	*Content Reference*	*Page Name*	*Search Key*
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 8.0 SP1

This table lists the link definitions delivered by the PeopleSoft system for PeopleSoft HCM, version 8.0 SP1:

Note. This data is delivered with the Active Flag set to *Inactive.*

Category	*Link Name*	*Short Name*	*Content Reference*	*Page Name*	*Search Key*
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BENEFITS_SUMMARY1	EMPLID
BENEF	DEBEN	Dependent/Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS_CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANSA_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	US_PLAN_1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GVT_GENL_DED_DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_ADD_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for Campus Solutions

This table lists the link definitions delivered by PeopleSoft CRM

Note. This data is delivered with the Active Flag set to *Active.*

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
ACAD	ACD01	Academic Requirements	HC_RQ_SUMMARY_ACAD_GBL		EMPID
ACAD	ACD02	Academics Summary	HC_ACAD_SUMMARY_GBL	SCC_SUM_ACADEMICS	EMPID
ACAD	ACD03	Enrollment Summary	HC_STDNT_ENRL_INQ_GBL		EMPID
ACAD	ACD04	Quick Enroll Classes	HC_QUICK_ENROLL_GBL		EMPID
ACAD	ACD05	Search Classess	HC_CLASS_SEARCH_GBL4		EMPID
ACAD	ACD06	Search Course Catalog	HC_SSS_BROWSE_CATLG_GBL3		EMPID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
ACAD	ACD07	Exam Schedule	HC_EXAM_SCHEDULE_GBL	SSR_SSENRL_TERM	EMPID
ACAD	ACD08	Student Grades	HC_STDNT_GRADE_INQ_GBL		EMPID
ACAD	ACD09	Request Transcript	HC_TSCRPT_RQST_GBL		EMPID
ACAD	ACD10	Request Advisement Report	HC_SAA_RPT_RQST		EMPID
ACAD	ACD11	Transfer Course Credit	HC_TRNS_CRSE_MNL_GBL		EMPID
ACAD	ACD12	Transfer Test Credits	HC_TRNS_TEST_MNL_GBL		EMPID
ACAD	ACD013	Transfer Other Credits	HC_TRNS_OTHR_GBL		EMPID
ADM	ADM10	Admission Applications	HC_ADM_APPL_MAINTNCE_GBL1		EMPID
ADM	ADM20	Test Results	HC_ACAD_TST_RSLT_PERS_GBL		EMPID
ADM	ADM30	External Education	HC_ACAD_HISTORY_PERS_GBL		EMPID
CR	CR10	Contributor Profile	HC_AV_PRSN_BIO_DEMO_GBL		EMPID
CR	CR20	Relationship Summary	HC_AV_CNST_RELATION_GBL		EMPID
CR	CR30	Giving History	HC_AV_P_GPROFILE_GBL		EMPID
CS	CS10	Student Services Center	HC_SCC_STDCTR_ADMIN	SSS_STUDENT_CENTER	EMPID

Category	***Link Name***	***Short Name***	***Content Reference***	***Page Name***	***Search Key***
CS	CS100	Comment Summary	HC_OPR_3C_SUM_PERS_GBL3		EMPID
CS	CS20	Constituent Addresses	HC_ADDRESS_MAINT_GBL2		EMPID
CS	CS30	Constituent Electronic Address	HC_E_MAIL_ADDR_PERS_GBL		EMPID
CS	CS40	Constituent Phones	HC_PHONE_PERS_GBL		EMPID
CS	CS50	Emergency Contact	HC_EMERG_NTC_SA_PERS_GBL		EMPID
CS	CS60	Manage Service Indicators	HC_SCC_SI_SUMRY_PERS		EMPID
CS	CS70	Affiliations	HC_SCC_AFL_ADDUPD_GBL		EMPID
CS	CS80	Checklist Summary	HC_CHKLST_SUMM_PERS_GBL5		EMPID
CS	CS90	Communication Summary	HC_COMM_SUMMARY_PERS_GBL4		EMPID
FIN	FIN10	Financial Aid Status	HC_SS_FA_AU_STATUS_GBL		EMPID
FIN	FIN20	View Term Award Summary	HC_STDNT_AWRD_INQUIRY_GBL		EMPID
FIN	FIN30	View Anticipated Aid by Term	HC_ANTICIPTD_AID_SUMM_GBL		EMPID
FIN	FIN40	Account Summary	HC_ACCOUNT_VW_GBL4		EMPID
FIN	FIN50	Payment Plan	HC_PAYMENT_PLAN_GBL		EMPID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
FIN	FIN60	Tuition Calculation	HC_TUITION_CALC_GBL		EMPID
FIN	FIN70	Pay Tuition Fee	HC_GRP_QUICK_POST_GBL		EMPID
FIN	FIN80	Miscellaneous Fees	HC_OPT_FEE_STDNT_GBL		EMPID

Link Definitions for Oracle E-Business HRMS

This table lists the link definitions delivered by PeopleSoft CRM

Note. This data is delivered with the Active Flag set to *Active.*

Category	Link Name	Short Name	Content Reference	Search Key
EBABS	ABENT	Absences Entry	CR_RC_HRHD_EBS_ABENT	P_PERSON_ID P_BGID
EBABS	ABMNG	Absence Management	CR_RC_HRHD_EBS_ABSMAN	P_PERSON_ID P_BGID
EBABS	ACCRV	View Accruals	CR_RC_HRHD_EBS_ACCRUALS	P_PERSON_ID P_BGID
EBASN	ASNEX	Assignment Extra Information	CR_RC_HRHD_EBS_ASSIGNX	P_PERSON_ID P_BGID
EBASN	ASNRT	Assignment Rate	CR_RC_HRHD_EBS_ASSIGNR	P_PERSON_ID P_BGID
EBASN	ASSGN	Assignment	CR_RC_HRHD_EBS_ASSIGNMENT	P_PERSON_ID P_BGID
EBASN	COST	Change Cost Center	CR_RC_HRHD_EBS_CHGCOST	P_PERSON_ID P_BGID

Category	*Link Name*	*Short Name*	*Content Reference*	*Search Key*
EBASN	HOURS	Change Hours	CR_RC_HRHD_EBS_CHGHRS	P_PERSON_ID P_BGID
EBASN	HRVW	HE Views	CR_RC_HRHD_EBS_HRVIEWS	P_PERSON_ID P_BGID
EBASN	JOB	Change Job	CR_RC_HRHD_EBS_CHGJOB	P_PERSON_ID P_BGID
EBASN	PREF	Work Preferences	CR_RC_HRHD_EBS_WORKPREF	P_PERSON_ID P_BGID
EBASN	RELIN	Release Information	CR_RC_HRHD_EBS_RELEASE	P_PERSON_ID P_BGID
EBASN	STAT	Worker Status Change	CR_RC_HRHD_EBS_WORKSTAT	P_PERSON_ID P_BGID
EBASN	TENUR	Tenure Status	CR_RC_HRHD_EBS_TENURE	P_PERSON_ID P_BGID
EBCMP	BNBAL	Person Benefits Balances	CR_RC_HRHD_EBS_PERBENBAL	P_PERSON_ID P_BGID
EBCMP	BSASN	Person Benefit Assignment	CR_RC_HRHD_EBS_PERBENASSIGN	P_PERSON_ID P_BGID
EBCMP	COBRA	COBRA Qualified Beneficiaries	CR_RC_HRHD_EBS_COBRABEN	P_PERSON_ID P_BGID
EBCMP	COURT	Court Order Form	CR_RC_HRHD_EBS_COURT	P_PERSON_ID P_BGID
EBCMP	DEPBN	Dependent/Beneficiary	CR_RC_HRHD_EBS_DEPBEN	P_PERSON_ID P_BGID

Category	***Link Name***	***Short Name***	***Content Reference***	***Search Key***
EBCMP	ENACT	Person Enrollment Action Items	CR_RC_HRHD_EBS_ENRLACTION	P_PERSON_ID P_BGID
EBCMP	ENCRT	Enrollment Certifications	CR_RC_HRHD_EBS_ENRLCERT	P_PERSON_ID P_BGID
EBCMP	ENROL	View Enrollment Results	CR_RC_HRHD_EBS_ENRLRESULTS	P_PERSON_ID P_BGID
EBCMP	FLEX	Flex Program Enrollment	CR_RC_HRHD_EBS_FLEX	P_PERSON_ID P_BGID
EBCMP	LIFE	Process Life Events	CR_RC_HRHD_EBS_LIFEEVENTS	P_PERSON_ID P_BGID
EBCMP	NONFL	Non Flex Program Enrollment	CR_RC_HRHD_EBS_NONFLEX	P_PERSON_ID P_BGID
EBCMP	OVRRD	Override Plan Enrollment	CR_RC_HRHD_EBS_ENRLOVER	P_PERSON_ID P_BGID
EBCMP	PERCM	Person Communications	CR_RC_HRHD_EBS_PERCOM	P_PERSON_ID P_BGID
EBCMP	PLENR	Miscellaneous Plan Enrollment	CR_RC_HRHD_EBS_MISC	P_PERSON_ID P_BGID
EBCMP	PRIMC	Primary Care Provider	CR_RC_HRHD_EBS_PRIMCARE	P_PERSON_ID P_BGID
EBCMP	PRTIN	View Participant Information	CR_RC_HRHD_EBS_VPARTINFO	P_PERSON_ID P_BGID
EBCMP	PRTOV	Participation Override	CR_RC_HRHD_EBS_PARTOVR	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBCMP	RECPY	Record Continuing Payments	CR_RC_HRHD_EBS_CONTBEN	P_PERSON_ID P_BGID
EBCMP	REIMB	Reimbursement Requests	CR_RC_HRHD_EBS_REIMBUR SE	P_PERSON_ID P_BGID
EBCMP	SAVEN	Savings Plan Enrollment	CR_RC_HRHD_EBS_SAVEPLA N	P_PERSON_ID P_BGID
EBCMP	WHAT	What-if Eligibility	CR_RC_HRHD_EBS_WHATIF	P_PERSON_ID P_BGID
EBHR	ADDR	Address	CR_RC_HRHD_EBS_ADDRESS	P_PERSON_ID P_BGID
EBHR	APPL	Application	CR_RC_HRHD_EBS_APPLICAT ION	P_PERSON_ID P_BGID
EBHR	CNTCT	Contact	CR_RC_HRHD_EBS_CONTACT	P_PERSON_ID P_BGID
EBHR	COMDL	Communication Delivery Method	CR_RC_HRHD_EBS_COMMDE L	P_PERSON_ID P_BGID
EBHR	EDUCA	Education and Qualification	CR_RC_HRHD_EBS_EDUCATE	P_PERSON_ID P_BGID
EBHR	EXINF	Extra Information Type	CR_RC_HRHD_EBS_XINFO	P_PERSON_ID P_BGID
EBHR	INFO	Personal Information	CR_RC_HRHD_EBS_PERINFO	P_PERSON_ID P_BGID
EBHR	MEDIC	Medical Assessments	CR_RC_HRHD_EBS_MEDICAL ASSESS	P_PERSON_ID P_BGID

Category	***Link Name***	***Short Name***	***Content Reference***	***Search Key***
EBHR	OTHQL	Other Qualification	CR_RC_HRHD_EBS_OTHERQUAL	P_PERSON_ID P_BGID
EBHR	PERDT	Enter Person Details	CR_RC_HRHD_EBS_PERDETAILS	P_PERSON_ID P_BGID
EBHR	PERX	Person Extra Information	CR_RC_HRHD_EBS_PERSONX	P_PERSON_ID P_BGID
EBHR	PHONE	Phone	CR_RC_HRHD_EBS_PHONE	P_PERSON_ID P_BGID
EBHR	PICT	Picture	CR_RC_HRHD_EBS_PICTURE	P_PERSON_ID P_BGID
EBHR	PRVEM	Previous Employment	CR_RC_HRHD_EBS_PREVEMPL	P_PERSON_ID P_BGID
EBHR	QUALF	Qualification	CR_RC_HRHD_EBS_QUAL	P_PERSON_ID P_BGID
EBHR	RANK	Academic Rank	CR_RC_HRHD_EBS_RANK	P_PERSON_ID P_BGID
EBHR	RECOR	Document of Records	CR_RC_HRHD_EBS_DOCREC	P_PERSON_ID P_BGID
EBHR	SCHOL	School/College Attended	CR_RC_HRHD_EBS_SCHOOL	P_PERSON_ID P_BGID
EBHR	SPECI	Special Information	CR_RC_HRHD_EBS_SPECIALINFO	P_PERSON_ID P_BGID
EBHR	SPINF	Special Information Types	CR_RC_HRHD_EBS_SINFO	P_PERSON_ID P_BGID

Category	*Link Name*	*Short Name*	*Content Reference*	*Search Key*
EBMWK	MNTCW	Maintaining Contingent Worker	CR_RC_HRHD_EBS_TMPLCW	P_PERSON_ID P_BGID
EBMWK	MNTEM	Maintaining Employee	CR_RC_HRHD_EBS_TMPLEMPL	P_PERSON_ID P_BGID
EBMWK	MNTVI	Maintaining Visa	CR_RC_HRHD_EBS_TMPLVISA	P_PERSON_ID P_BGID
EBPAY	ASSGN	Assignment Process Results	CR_RC_HRHD_EBS_ASSIGNRES	P_PERSON_ID P_BGID
EBPAY	CMPT	Total Compensation	CR_RC_HRHD_EBS_TOTALCOMP	P_PERSON_ID P_BGID
EBPAY	EARN	Statement of Earnings	CR_RC_HRHD_EBS_EARNINGS	P_PERSON_ID P_BGID
EBPAY	EHIST	View Entry History	CR_RC_HRHD_EBS_ENTRYHIST	P_PERSON_ID P_BGID
EBPAY	ELEM	Element Entries	RC_HRHD_EBS_ELEMENT	P_PERSON_ID P_BGID P_FUNCNAME
EBPAY	EMVBL	View Employee Balances	CR_RC_HRHD_EBS_EMPLBALANCE	P_PERSON_ID P_BGID
EBPAY	EXPAY	External/Manual Payments	CR_RC_HRHD_EBS_MANPAY	P_PERSON_ID P_BGID
EBPAY	PAYMN	Manage Payroll Payments	CR_RC_HRHD_EBS_PAYPAY	P_PERSON_ID P_BGID
EBPAY	PAYSL	Pay Slip	CR_RC_HRHD_EBS_PAYSLIP	P_PERSON_ID P_BGID

Category	***Link Name***	***Short Name***	***Content Reference***	***Search Key***
EBPAY	PRSPY	Personal Pay Methods	CR_RC_HRHD_EBS_PAYMETH	P_PERSON_ID P_BGID
EBPAY	SALHS	Salary History	CR_RC_HRHD_EBS_SALHIST	P_PERSON_ID P_BGID
EBPAY	TXBAL	View Tax Balances	CR_RC_HRHD_EBS_TAXBALANCE	P_PERSON_ID P_BGID
EBPUK	MILE	Mileage Claim	CR_RC_HRHD_EBS_CLAIM	P_PERSON_ID P_BGID
EBPUK	P45	P45 Form	CR_RC_HRHD_EBS_P45	P_PERSON_ID P_BGID
EBPUK	PAY11	P11D	CR_RC_HRHD_EBS_P11D	P_PERSON_ID P_BGID
EBPUK	PRVEH	Private Vehicle Entry	CR_RC_HRHD_EBS_PVEHICLE	P_PERSON_ID P_BGID
EBPUK	SSP	SSP/SMP/Paternity/Adoption	CR_RC_HRHD_EBS_SSP	P_PERSON_ID P_BGID
EBPUK	TAX	Tax Information	CR_RC_HRHD_EBS_FEDTAX	P_PERSON_ID P_BGID
EBPUK	TAXBL	Tax Balances	CR_RC_HRHD_EBS_ADJUSTTAX	P_PERSON_ID P_BGID
EBPUK	TXINF	UK Tax Information	CR_RC_HRHD_EBS_UKTAX	P_PERSON_ID P_BGID
EBPUK	TXSUM	Tax Balance Summary	CR_RC_HRHD_EBS_TAXBALSUM	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBPUK	W2	Employee W-2	CR_RC_HRHD_EBS_W2	P_PERSON_ID P_BGID
EBPUK	W4	W-4	CR_RC_HRHD_EBS_W4	P_PERSON_ID P_BGID

Link Definitions for PeopleSoft CRM

This table lists the link definitions delivered by PeopleSoft CRM.

Note. This data is delivered with the Active Flag set to *Active.*

Category	Link Name	Short Name	Portal CREF	Content Reference	Class Path	Class ID	Search Key	Method
RELA	ADV01	Freezer Dialog	Employee		RC_LINK:APPS_RC	PCode	ADV_ID	LaunchAdvisor
RELA	ASSET	Asset Summary	Employee	CR_RC_ASSET_SUMMARY			cfResourceIdentifier	
RELA	BPDEF	Defect Workflow	Employee		RC_LINK:APPS_RC	PCode	RC_BUS_PROCESS_ID	ExecuteBusinessProject
RELA	BPEL	BPEL Process						
RELA	BPRJ	Business Project	Employee		RC_LINK:APPS_RC	PCode		ExecuteGenBusinessProject
RELA	BSCR	Branch Script	Employee		RC_LINK:APPS_RC	PCode		ExecuteGen-Script

Category	***Link Name***	***Short Name***	***Portal CREF***	***Content Reference***	***Class Path***	***Class ID***	***Search Key***	***Method***
RELA	CREQ	Change Request - Create New	Employee		RC_LINK: APPS_RC	PCode		CreateChangeRequest
RELA	EM	Enterprise Manager						
RELA	FRAUD	Case Fraud Workflow			RC_LINK: APPS_RC	PCode	BP_ID	ExecuteBusinessProject
RELA	LEAD	Sales Lead	Employee		RC_LINK: APPS_RC	PCode		CreateLead
RELA	NDEF	Defect - Create New	Employee		RC_LINK: APPS_RC	PCode		CreateDefect
RELA	OFFR	Offer History						
RELA	ORDER	Sales Order	Employee		RC_LINK: APPS_RC	PCode		CreateSales-Order
RELA	RCREQ **Note.** Applies only to HelpDesk, not HR HelpDesk	Change Request - Relate	Employee		RC_LINK: APPS_RC	PCode		RelateChangeRequest

Category	Link Name	Short Name	Portal CREF	Content Reference	Class Path	Class ID	Search Key	Method
RELA	RDEF	Defect - Relate Existing	Employee		RC_LINK: APPS_RC	PCode		RelateDefect
RELA	REMOT	Remote Control	Employee	CR_RC_REMOTE_CONTROL			cfResourceIdentifier	
RELA	RMA	Create RMA	Employee		RC_LINK: APPS_RC	PCode		CreateRMA
RELA	SO	Service Order	Employee		RC_LINK: APPS_RC	PCode		CreateSO
RELA	SWDEL	Software Delivery	Employee	CR_RC_SOFTWARE_DELIVERY				
RELA	WEBAD	Asset Administrator	Employee	CR_RC_ASSET_ADMIN			cfResourceIdentifier	
RELA	WO	Work Order - Create New	Employee		RC_LINK: APPS_RC	PCode		CreateWO
RELA	SRVY	Case Survey			RC_LINK: APPS_RC	PCode		Send Survey

Setting Up Content References

This section discusses how to:

- Set up content references.
- Set up security for content references.

Pages Used to Set Up Content References

Page Name	***Definition Name***	***Navigation***	***Usage***
Content Ref Administration	PORTAL_CREF_ADM	PeopleTools, Portal, Structure and Content Click the Add Content Reference link.	Set up content references.
Content Reference Security	PORTAL_CREF_SEC	PeopleTools, Portal, Structure and Content Click the Add Content Referencelink. Access the Security page.	Set up security for content references.

Setting Up Content References

The PeopleSoft system delivers the content references for PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources. To link to non-PeopleSoft locations, you must register the links as content references for the employee portal.

Note. To link to non-Peoplesoft content, you must license the PeopleSoft Enterprise Portal.

Based on the security provided in the portal, individual agents will see the links for the content to which they have access.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*.

Setting Up Security for Content References

The availability of a link is based on the security that you define for the content reference. You must set up security that matches the security for the target page. If a mismatch occurs, a user receives an error message when they try to access the page.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology*.

Viewing and Modifying Link Definitions

To view and modify link definitions, use the Link Definition (RC_LINK), Link Category (RC_LINK_CAT), and Link Group (RC_LINK_GROUP) components.

This section discusses how to:

- View and modify link categories.
- View and modify link definitions.

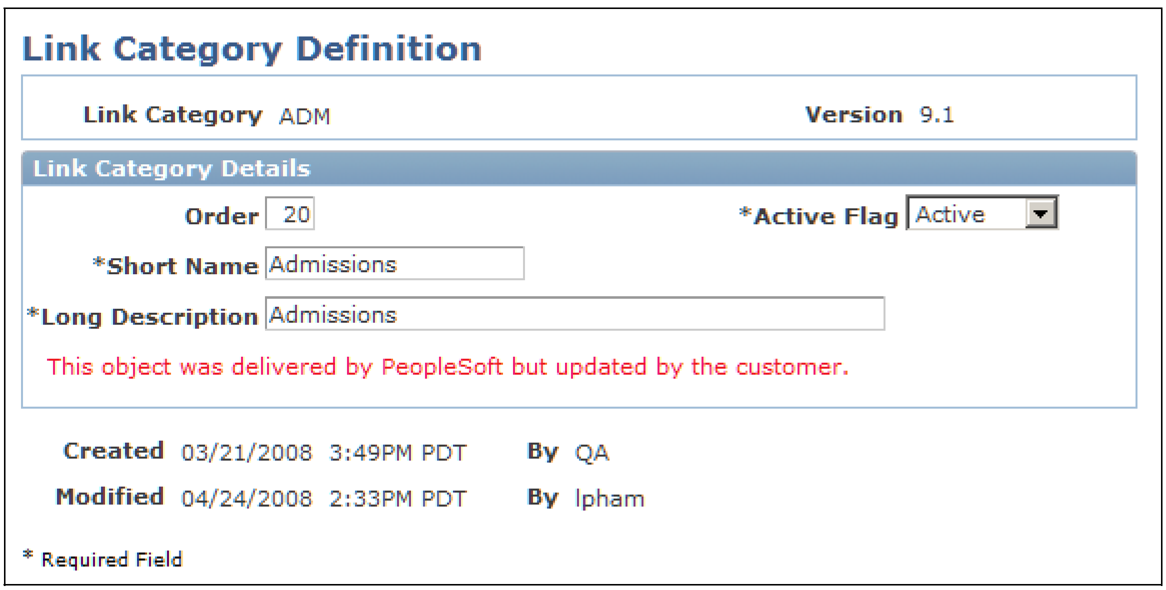
- View and modify link groups.

Pages Used to View and Modify Link Definitions

Page Name	*Definition Name*	*Navigation*	*Usage*
Link Category Definition	RC_LINK_CAT_PNL	Set Up CRM, Product Related, Call Center, Link Category, Link Category	View and modify the categories into which link definitions are organized.
Link Definition	RC_LINK_PNL	Set Up CRM, Product Related, Call Center, Link Definition, Link Definition	View and modify link definitions.
Link Group	RC_LINK_GROUP	Set Up CRM, Product Related, Call Center, Link Group, Link Group	View and modify the link groups into which link categories are organized.

Viewing and Modifying Link Categories

Access the Link Category Definition page (Set Up CRM, Product Related, Call Center, Link Category, Link Category).



Link Category Definition page

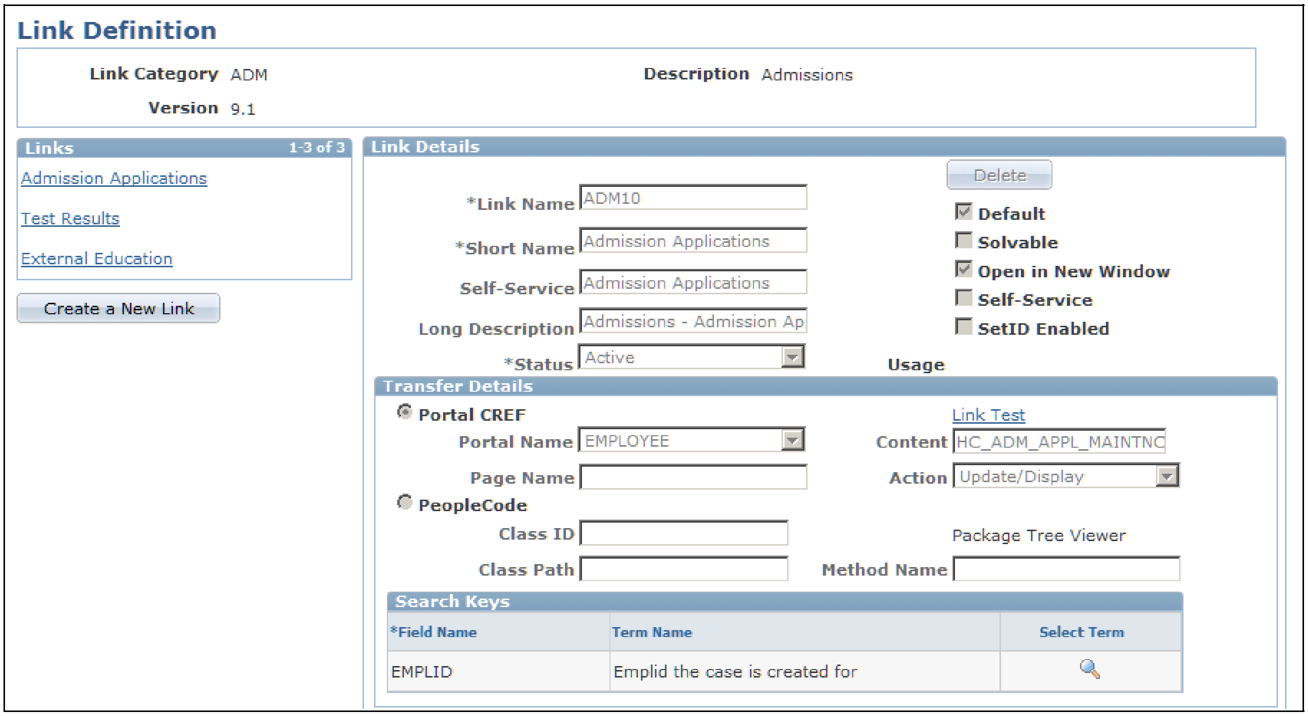
Order	Enter a number to indicate the order in which you want the item to appear on the Case page
Short Name and **Long Description**	Enter descriptions to identify the link category you are adding or modifying.

Active Flag Select either *Active* or *Inactive.*

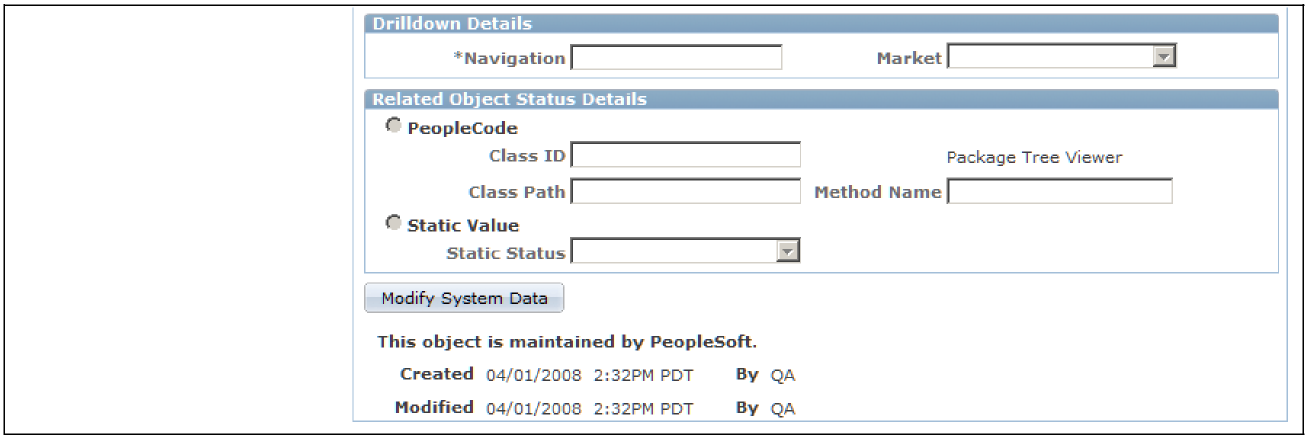
Modify System Data Click to modify the system data and select or enter information into the Active Flag, Order, Short Name, and Long Description fields. The following message appears: *This object was delivered by PeopleSoft but updated by the customer.*

Viewing and Modifying Link Definitions

Access the Link Definition page (Set Up CRM, Product Related, Call Center, Link Definition, Link Definition).



Link Definition page (1 of 2)



Link Definition page (2 of 2)

Link Details

Link Name Enter a name for this link.

Short Name Enter a short name for this link definition. The text you enter in this field appears on the Link Group page in the drop-down list box for the Link Category field.

Self-Service The text you enter in this field appears on the self-service application page.

Long Description Enter a long description. Use this field to describe a particular link definition in more detail.

Status Select either *Active* or *Inactive.*

The system includes only the active link definitions in the Link Category drop-down list box on the Case page.

Default Select this check box if you want the link to become the default for the category when it appears on the Case page.

Note. Because users may not have access to all links, you can set multiple defaults.

Solvable Select this check box if you want the agent to close a case by performing an action.

Closing a case by performing an action is a manual process. If the agent performs an action that resolves the case, then the agent must change the case status to *Closed* and save the Case page.

Note. All actions are delivered as non-solvable when you first install the application.

Open in New Window	Select this check box if you want a new browser session to appear when the agent selects the action and clicks the Go button on the Case page. **Note.** This option is applicable for those link definitions that are Portal CREFs.
Self-Service	Select this check box to have this action available on the Manage Case page in your self-service applications.
SetID Enabled	Select this check box to make the setID column visible in the Search Keys grid on the Link Definition page. This setting forces you to enter a setID value in the field. At runtime, the system compares the setID derived from the case business unit with the setID of the link definition. If the setIDs don't match, then the system does not display the link definition in the Related Actions drop-down list box. This setting is done to avoid displaying a message to the user that the selected actions cannot be performed because the setIDs don't match.
Usage	Displays the usage count. The value in this field increments each time the system adds the link to the Related Action Summary sections with the Case component. To find out which links are used most often, you can write reports using this field.

Transfer Details

Portal CREF	Select this option to create a portal content reference.
Portal Name	Select the object name that you want to associate with the link.
Content	The actual content reference.
Action	Select the page mode that appears when the page is accessed. Values are *Add*, *Correction*,*Update/Display* or *Update/Display All.*
PeopleCode	Select this option if the PeopleCode method needs to be invoked when the action is performed.
Class ID	Specify the name of the application class.
Class Path	Specify the class path of the application package.
Method Name	Specify the method name.

Field Name

This field identifies the search keys that the system uses to access the linked component. Search keys can be mentioned by associating terms that are used in AAF policies. These terms are resolved when an action is performed from the Case page.

For example, EMPLID (employee ID) is the search key used for most PeopleSoft HCM transactions and is associated as Term to the link definition. Term can also be configurable. Users can click the Lookup button to provide the value for the configurable term. For example, see the Defect Workflow Link Definition in the Related Actions Link category.

Note. To bypass the Send Case Survey page when an agent selects the *Case Survey* link, modify the system data and use the Search Keys group box to select the last three terms that appear under Call Center, Link Definition after you select the Add Term button. These terms include:*Select a Dialog Business Unit <BUSINESS_UNIT>, Select a Dialog ID <DIALOG_ID>,* and *Select an External Event Trigger <EXT_EVENT_TRIGGER>.*

Term Name

This value is not editable if the selected term is not configurable. If the selected term is configurable, then this field appears as a link.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Working with Active Analytics Framework," Understanding AAF.

DrillDown Details

This section captures the details about the component and page to transfer control to when the user clicks one of the rows in the Related Actions Summary on the Case Summary page.

Navigation

Select the transaction ID of the page to which you want the system to navigate.

Market

Select the object name that you want to associate with the link.

Related Object Status Details

This section captures the PeopleCode method that the system will invoke to get the status of the action that is performed. This status is displayed in the Related Actions Summary grid on the Case Summary page.

PeopleCode

Select this option to invoke PeopleCode to capture the status of the action.

Class ID

Enter the name of the application class.

Class Path

Enter the class path of the application package.

Method Name

Enter the method name.

Static Value

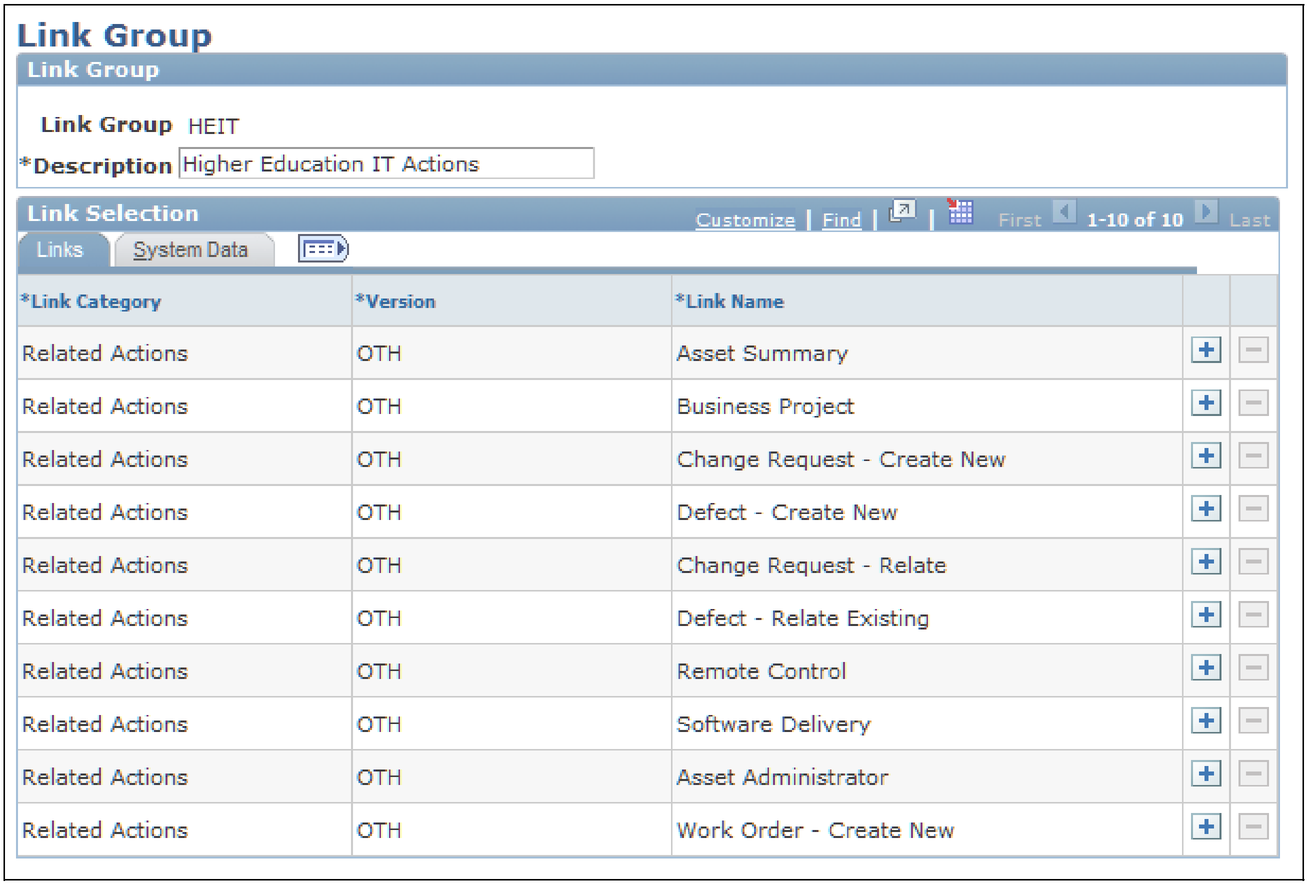
Select this option if the static status value needs to appear for an action.

Static Status

Select the static status value that will appear for this link definition.

Viewing and Modifying Link Groups

Access the Link Group page (Set Up CRM, Product Related, Call Center, Link Group, Link Group).



Link Group page

Link Selection - Links

Description Enter a description of the link group that you want to create.

Link Category Select a link category that contains the desired link definition that you want in this link group.

Version Select a version. A category can have multiple versions, each associated with a different target system (for example, PeopleSoft HCM 8.9, PeopleSoft HCM 8.8, and so on). However, only one version of a category can be active at any time. Only the active version appears in this drop-down list box.

Link Name Select a link name. Only those link definitions that are defined within the selected link category appear in the drop-down list box.

Note. To add a new link group, click the Add button at the end of the row.

Link Selection - System Data

System Data	If the link group was delivered by the PeopleSoft system, the system displays a button that you can click to revise the link associated with the button. The system displays the message: *This object was delivered by PeopleSoft but updated by the customer*. It also enters the date it was modified. You can then click the Links tab and make changes to the link category.
Message Description	Displays a message indicating who modified or is maintaining the link group.
Date Modified	Displays the date the link group was modified.
Modified By	Displays the name of the person who modified the link group.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Display Template General Options for PeopleSoft Call Center, page 43

Chapter 6

Setting Up PeopleSoft Change Management

This chapter provides an overview of PeopleSoft Change Management setup and discusses how to:

- Set up prompt tables for change requests.
- Set up Change Management business units.
- Set up Change Management defaults.
- Set up template duration levels.
- Set up phase templates.
- Set up the task type role map.

Understanding PeopleSoft Change Management Setup

This section discusses:

- Change Management usages.
- Change request prompt tables.
- Phase templates.
- Transitions and Active Analytics Framework (AAF).
- Task type role map and the assignment engine.
- Security considerations for accessing Change Management tasks.

Change Management Usages

PeopleSoft Change Management is used to codify and manage an organization's internal business processes. For example, a help desk might use PeopleSoft Change Management for commonly performed processes, such as upgrading a user's computer or scheduling an employee's office relocation.

Requests for changes are recorded on the Change Request page. This page also manages the change process status, type, and priority, as well as key dates, impacted assets, and products.

See Chapter 18, "Using Change Management," page 425.

Change Request Prompt Tables

PeopleSoft Change Management prompt tables refer to a group of relatively simple setup tables that hold the values for various drop-down list box fields on the Change Request page.

Here is a list of the prompt tables that you should set up to use PeopleSoft Change Management:

- Business Reason
- Category
- Component Audit
- Impact
- Note Type
- Phase
- Phase Template
- Phase Template Use
- Priority
- Relationship Type
- Resolution
- Request Type
- Status
- Status Transition
- Sub Type
- Task Type Role Map

Phase Templates

Each step in the change process consists of a phase. A phase comprises a task or a series of tasks. Tasks describe the work to be performed and the amount of time that the task normally takes.

At runtime, on the Change Request page, users can manually build phases in the Phase Summary grid. Alternatively, users can load phases automatically using phase templates. This alternative enables the phase model to be automatically populated to the Phase Summary grid when you select the appropriate template from the Template field.

PeopleSoft offers functionality that enables this grid to be populated automatically based on the request type, subtype, and priority that a user selects on the Change Request page. Phase templates created via this setup with matching request type, subtype, and priority criteria are linked to the phase template when it is built. You can autoload phase templates by clicking the Load button.

If you click the Load button and no template exists that matches the current type, subtype, and priority, the system displays the Phase Template Load page. You can then select a template to load.

Transitions and Active Analytics Framework

Much of the automatic functionality for controlling the process flow of a change request is accomplished using the AAF functionality. This method provides the most flexibility for a configurable process flow of change requests.

The AAF setup is configurable and implemented within both the Change Management and Task Management applications. This enables users to build rules as to who to notify (what roles), when to notify them (when a status or phase changes occur), and in what format (email or worklist). It also enables users to build rules that notify all impacted parties when a change is set to be implemented.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Task Type Role Map and the Assignment Engine

If you want the PeopleSoft Change Management application to know which roles are appropriate for a task, you must map the task type to the role. One-to-one mapping between task type and role is sufficient for PeopleSoft Change Management. You can accomplish this mapping using the Task Type Role Map page. Select Set Up CRM, Product Related, Change Management to access the page.

Security Considerations for Accessing Change Management Tasks

When using Change Management, tasks may be assigned to different users, and normally users may only edit tasks that have been assigned to them. However, it is possible to use PeopleSoft Enterprise CRM application level security to allow certain users to change the owner of a task or to update tasks that are assigned to other users.

You can do this by using the Membership List page. Select Set Up CRM, Security, CRM Application Security, Search Membership List using *Task Manager* as the value for the Name field. Click the *Edit Member* link on the page to add or delete roles from the membership list. These roles refer to PeopleTools security roles: any users that have one of the associated roles that you list for the "Task Manager" Membership List will be allowed to update tasks which are assigned to other users.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Application Security.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Application Security.

Setting Up Prompt Tables for Change Requests

To set up prompt tables for change requests, use the Sub Type (RG_UD_REQ_SUB_TYPE), Status (RG_UD_REQ_STATUS), Request Type (RG_UD_REQ_TYPE), Resolution (RG_UD_REQ_RESO), Priority (RG_UD_REQ_PRTY), Phase (RG_UD_REQ_STATE), Impact (RG_UD_REQ_IMPACT), Category (RG_UD_REQ_CATGY), Business Reason (RG_UD_REQ_BUSR), Component Audit (RG_UD_COMP_AUDIT), Note Type (RG_UD_REQ_NOTT), Relationship Type (RG_UD_REL_TYPE), Status Transition (RG_UD_PHS_TRANS) components.

This section discusses how to:

- Set up change request business reasons.
- Set up change request categories.
- Set up the change request component audit page.
- Set up change request impact values.
- Set up change request note types.
- Set up change request phases.
- Set up change request priorities.
- Set up change request relationship types.
- Set up change request resolutions.
- Set up change request types.
- Set up change request statuses.
- Set up change request status transitions.
- Set up change request subtypes.

Pages Used to Set Up Prompt Tables for Change Requests

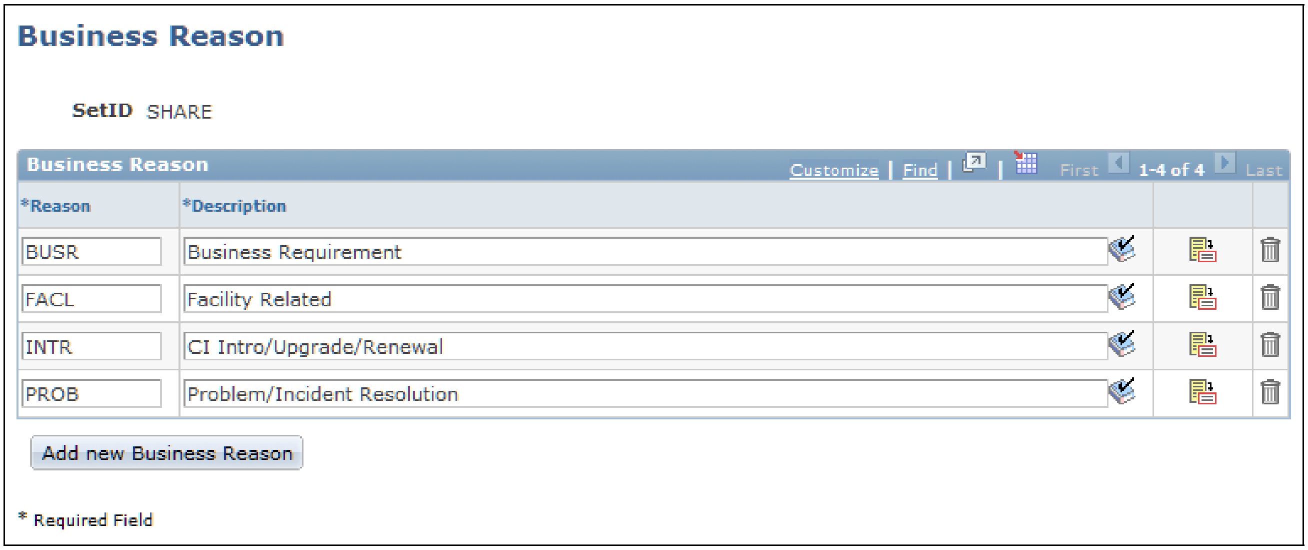
Page Name	***Definition Name***	***Navigation***	***Usage***
Business Reason	RG_UD_REQ_BUSR	Set Up CRM, Product Related, Change Management, Business Reason, Business Reason	Set up change request business reasons.
Category	RG_UD_REQ_CATGY	Set Up CRM, Product Related, Change Management, Category, Category	Set up change request categories.

Page Name	***Definition Name***	***Navigation***	***Usage***
Component Audit	RG_UD_REQ_AUDIT	Set Up CRM, Product Related, Change Management, Component Audit, Component Audit	Select the record or table name for which you want the system to generate and maintain audit records.
Impact	RG_UD_REQ_IMPACT	Set Up CRM, Product Related, Change Management, Impact, Impact	Set up change request impact values.
Note Type	RG_UD_REQ_NOTT	Set Up CRM, Product Related, Change Management, Note Type, Note Type	Set up note types.
Phase	RG_UD_REQ_STATE	Set Up CRM, Product Related, Change Management, Phase, Phase	Set up change request phases.
Priority	RG_UD_REQ_PRTY	Set Up CRM, Product Related, Change Management, Priority, Priority	Set up change request priorities.
Relationship Type	RG_UD_REL_TYPE	Set Up CRM, Product Related, Change Management, Relationship Type, Relationship Types	Set up descriptions of relationships that you want to appear on the Relate Existing Change Request page for change management cases that have a correlation in some way.
Resolution	RG_UD_REQ_RESO	Set Up CRM, Product Related, Change Management, Resolution, Resolution	Set up change request resolutions.
Request Type	RG_UD_REQ_TYPE	Set Up CRM, Product Related, Change Management, Request Type, Request Type	Set up change request types.
Status	RG_UD_REQ_STATUS	Set Up CRM, Product Related, Change Management, Status, Status	Set up change request statuses.
Status Transition	RG_UD_PHS_TRANS	Set Up CRM, Product Related, Change Management, Status Transition, Status Transition	Set up notifications when a change in status occurs.

Page Name	***Definition Name***	***Navigation***	***Usage***
Sub Type	RG_UD_REQ_SUB_TYPE	Set Up CRM, Product Related, Change Management, Sub Type, Sub Type	Set up change request subtypes.

Setting Up Change Request Business Reasons

Access the Business Reason page (Set Up CRM, Product Related, Change Management, Business Reason, Business Reason).

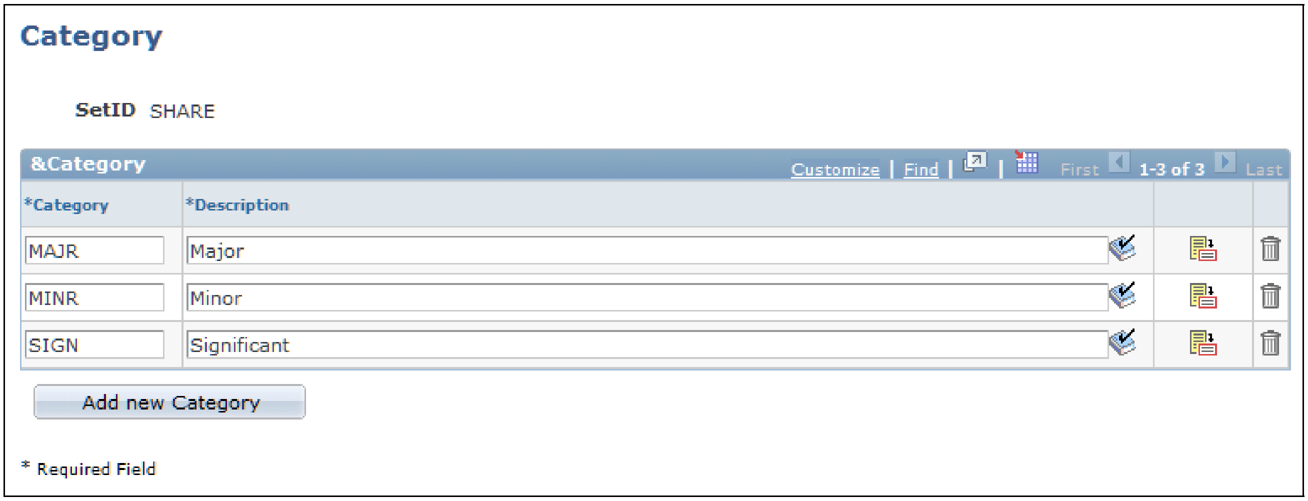


Business Reason page

Enter an abbreviation for the reason and the description that you want to appear on the Change Request page in the Business Reason drop-down list box. The Business Reason field appears in the Change Request section on the main Change Request page.

Setting Up Change Request Categories

Access the Category page (Set Up CRM, Product Related, Change Management, Category, Category).

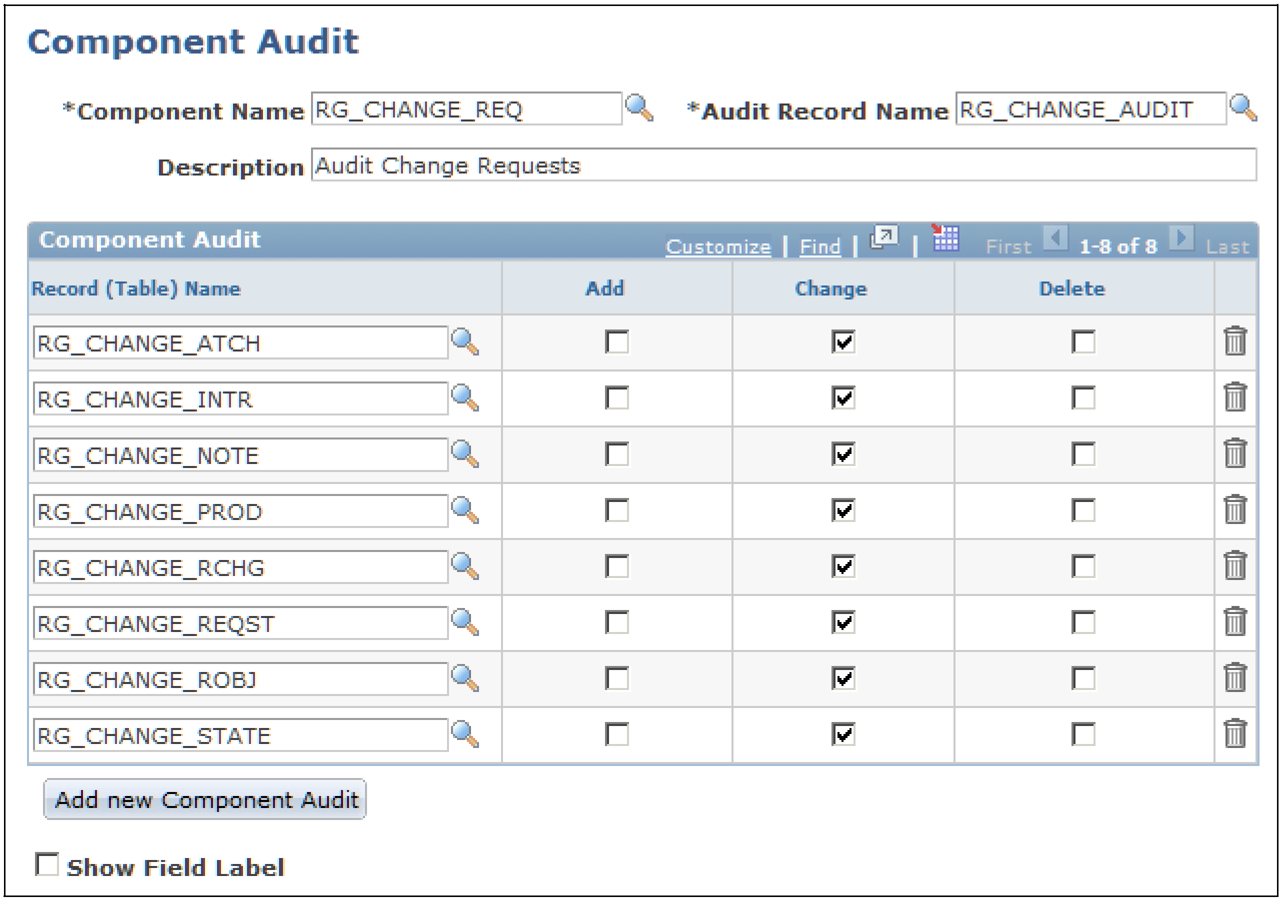


Category page

Enter an abbreviation for the category and the description that you want to appear on the Change Request page in the Category drop-down list box. The Category field appears in the Change Control section on the main Change Request page.

Setting Up the Change Request Component Audit Page

Access the Component Audit page (Set Up CRM, Product Related, Change Management, Component Audit, Component Audit).



Component Audit page

Select the record or table name that you want the system to audit. Then select the Change check box next to the actions for which you want the system to generate and maintain audit records. PeopleSoft CRM delivers this page with the Change check box selected for all the records and table names that are listed.

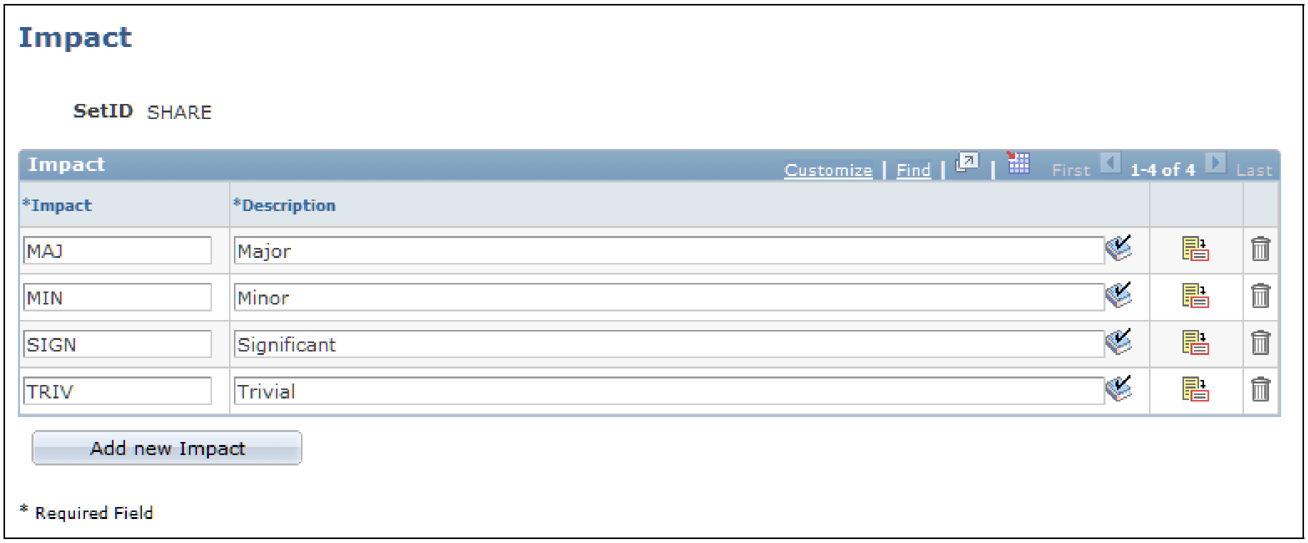
If you select the Add check box, and a row is added to the table, then the system generates an audit record and it is included in the audit report. The same is true for the Change and Delete check boxes.

Selecting the Change check box causes the system to generate audit records for everything except adds. Selecting the Delete check box would only generate audits for actions that were deleted.

Note. Selecting both the Delete and Change check boxes would be redundant and is not recommended.

Setting Up Change Request Impact Values

Access the Impact page (Set Up CRM, Product Related, Change Management, Impact, Impact).

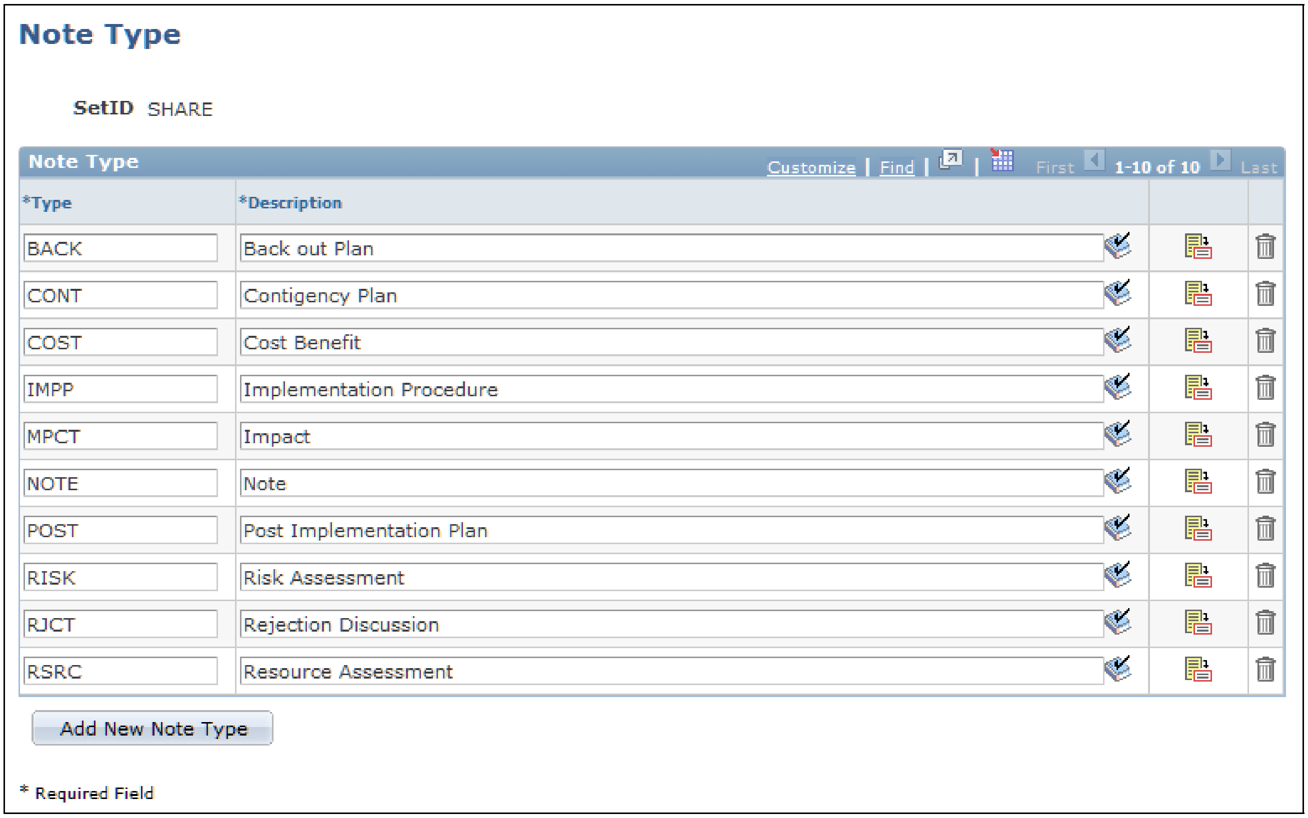


Impact page

Enter an abbreviation for the impact and the description that you want to appear on the Change Request page in the Impact drop-down list box. The Impact field appears in the Change Control section on the main Change Request page.

Setting Up Change Request Note Types

Access the Note Type page (Set Up CRM, Product Related, Change Management, Note Type, Note Type).



Note Type

SetID SHARE

Note Type — Customize | Find | First 1-10 of 10 Last

*Type	*Description
BACK	Back out Plan
CONT	Contigency Plan
COST	Cost Benefit
IMPP	Implementation Procedure
MPCT	Impact
NOTE	Note
POST	Post Implementation Plan
RISK	Risk Assessment
RJCT	Rejection Discussion
RSRC	Resource Assessment

Add New Note Type

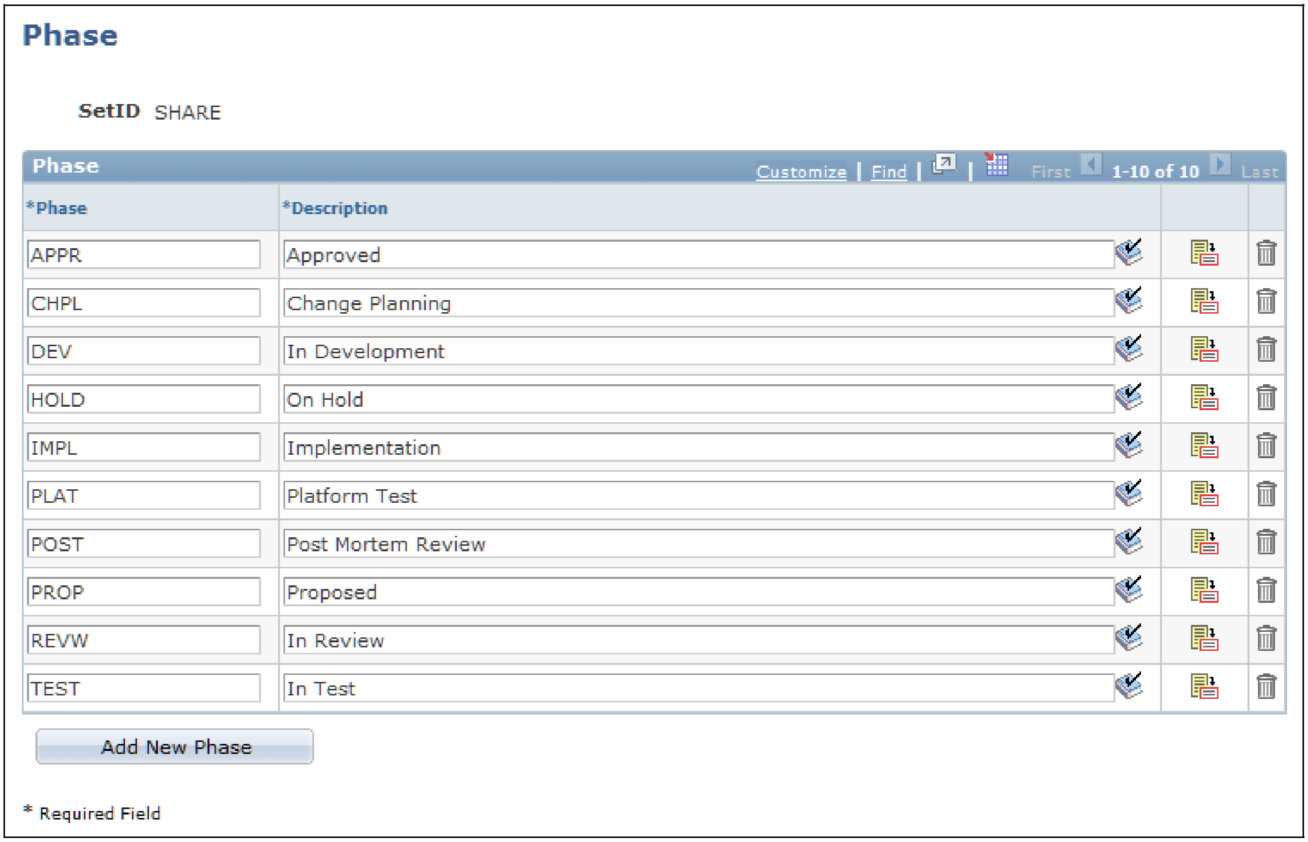
* Required Field

Note Type page

Enter an abbreviation for the note type and the description that you want to appear in the Type drop-down list box on the Change Request - Notes page.

Setting Up Change Request Phases

Access the Phase page (Set Up CRM, Product Related, Change Management, Phase, Phase).

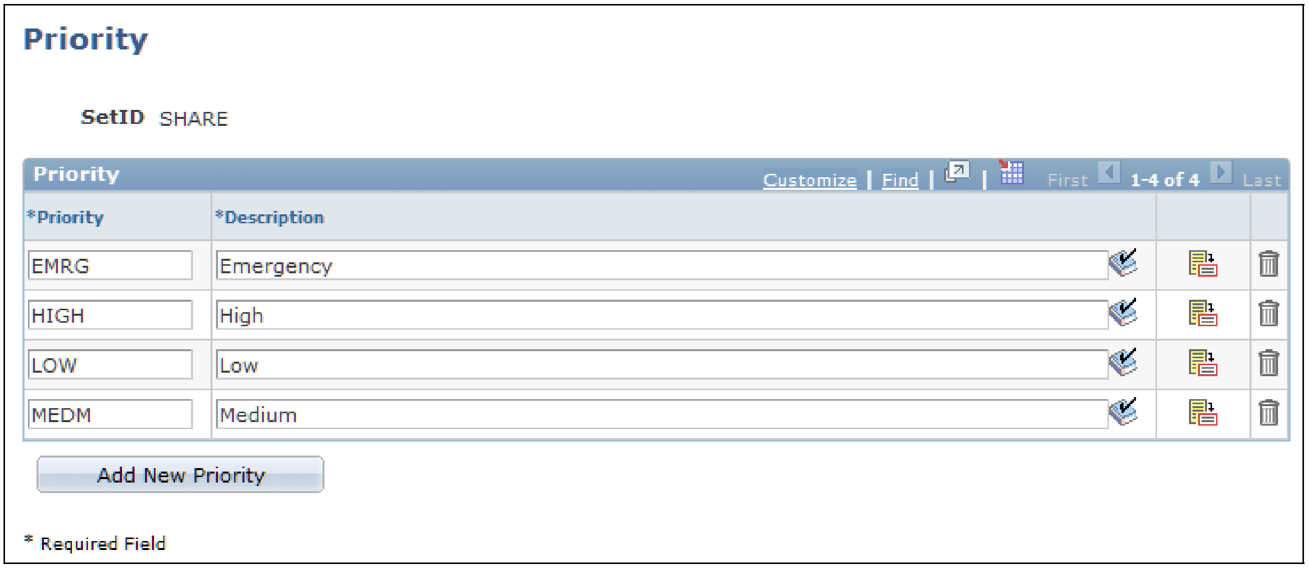


Phase page

Enter an abbreviation for the phase and the description that you want to appear on the Change Request page in the Phase drop-down list box. The Phase field appears in the Phase Summary section on the main Change Request page.

Setting Up Change Request Priorities

Access the Priority page (Set Up CRM, Product Related, Change Management, Priority, Priority).



Priority page

Enter an abbreviation for the priority and the description that you want to appear on the Change Request page in the Priority drop-down list box. The Priority field appears in the Change Request section on the main Change Request page.

Setting Up Change Request Relationship Types

Access the Relationship Types page (Set Up CRM, Product Related, Change Management, Relationship Type, Relationship Types).

Relationship Types page

Enter an abbreviation for the relationship type and the description that you want to appear in the Relationship Type drop-down list box on the Relate Existing Change Request page.

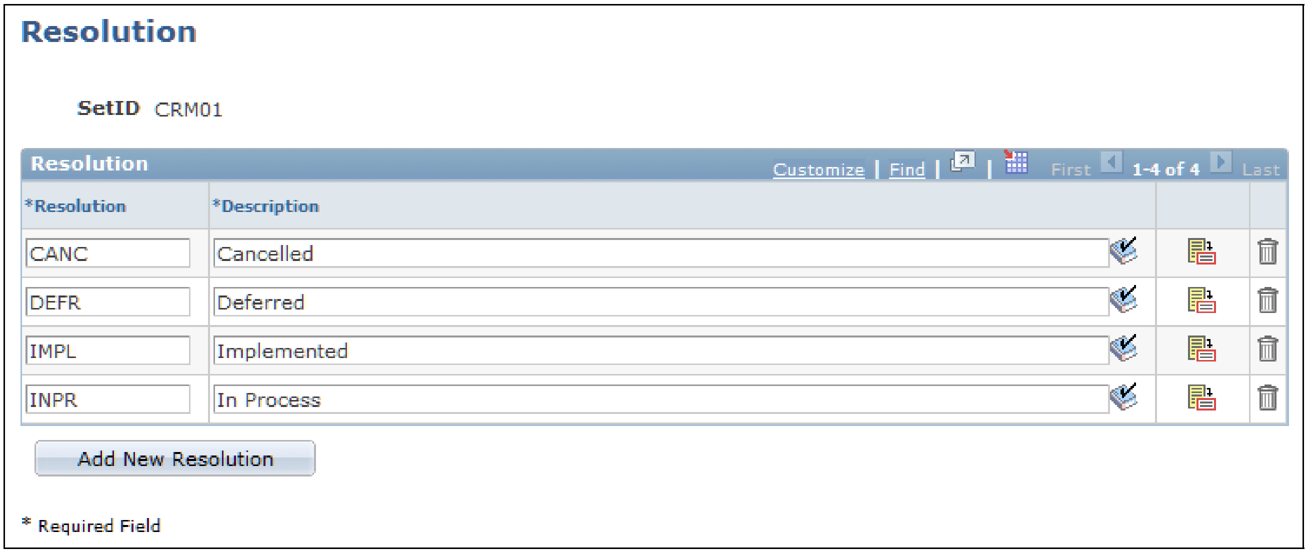
Select the Hierarchical check box to identify the relationship type as being either the parent or the child to the other relationship type (not an equal relationship type).

When you are recording a related change request, the system prompts you for a relationship type. When you select the 1st relationship type and the hierarchical check box is selected, then the hierarchical check box must be selected for the 2nd relationship type. The system also enforces the converse.

You access this page by clicking the Add Related Change button on the Change Request - Related Changes page.

Setting Up Change Request Resolutions

Access the Resolution page (Set Up CRM, Product Related, Change Management, Resolution, Resolution).

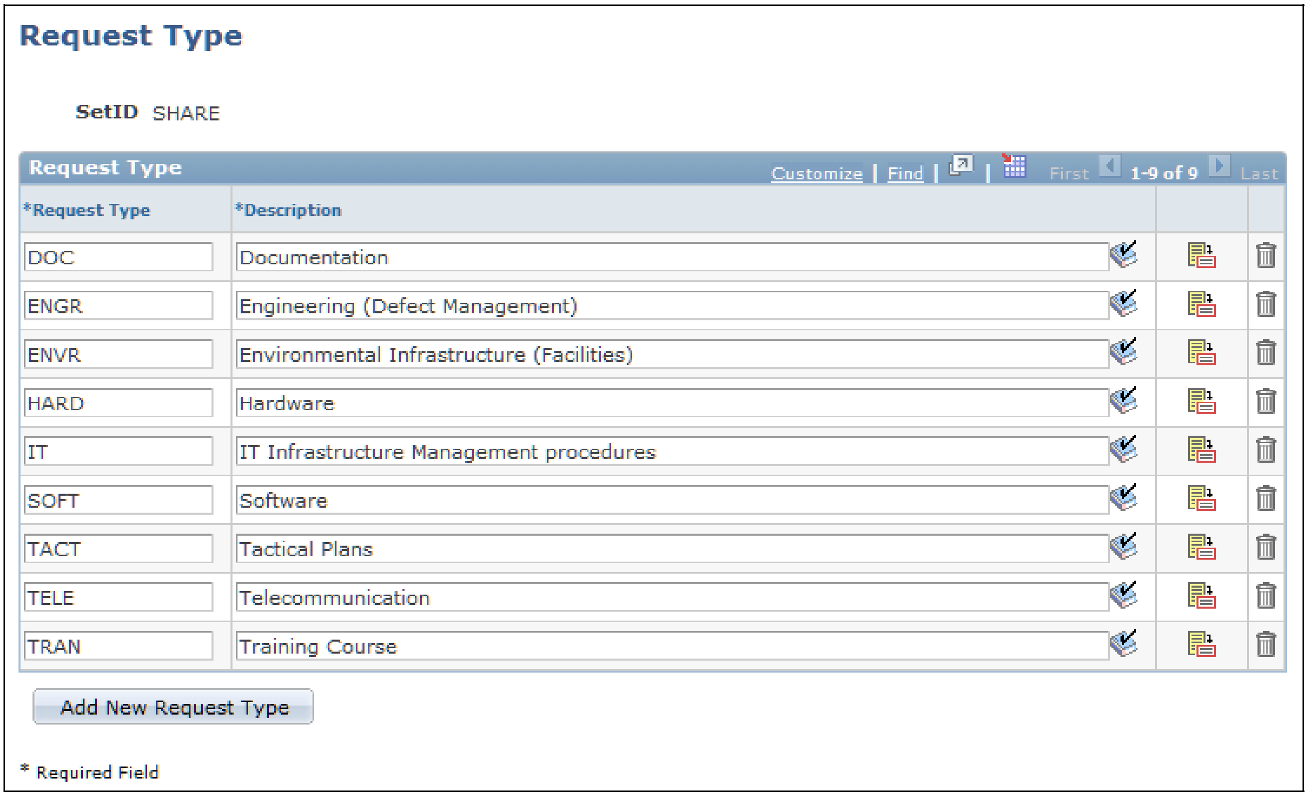


Resolution page

Enter an abbreviation for the resolution and the description that you want to appear on the Change Request page in the Resolution drop-down list box. The Resolution field appears in the Change Control section on the main Change Request page.

Setting Up Change Request Types

Access the Request Type page (Set Up CRM, Product Related, Change Management, Request Type, Request Type).

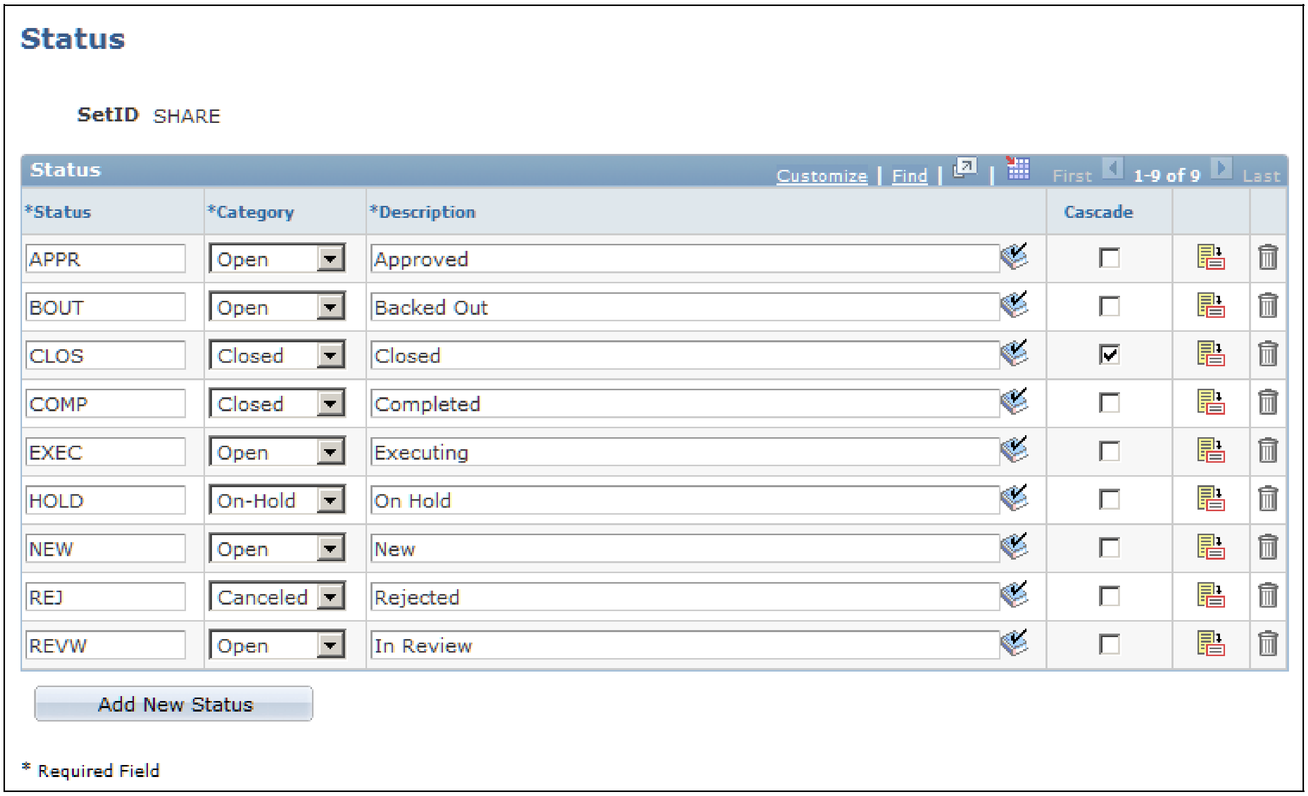


Request Type page

Enter an abbreviation for the request type and the description that you want to appear on the Change Request page in the Request Type drop-down list box. The Request Type field appears in the Change Request section on the main Change Request page.

Setting Up Change Request Statuses

Access the Status page (Set Up CRM, Product Related, Change Management, Status, Status).



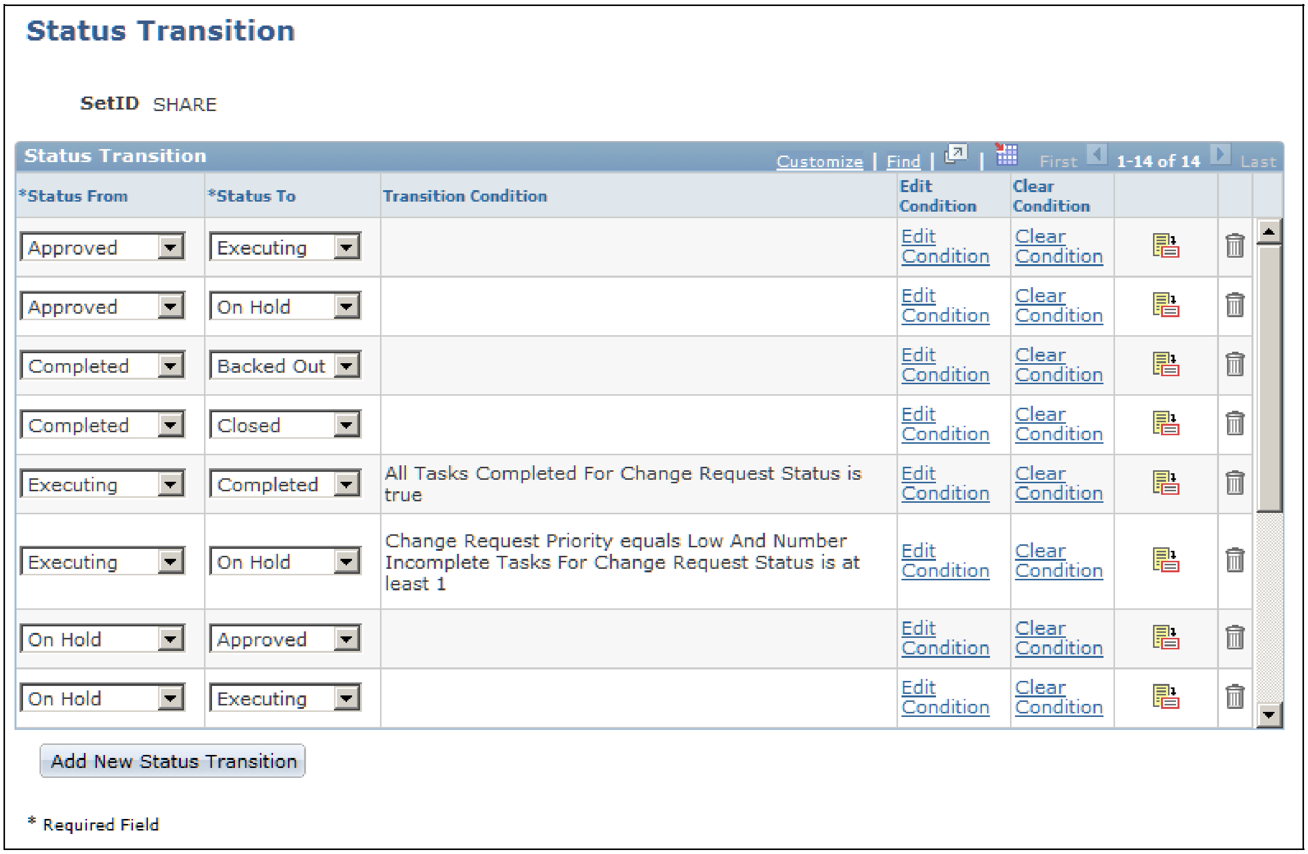
Status page

Enter an abbreviation for the status and the description that you want to appear on the Change Request page in the Status drop-down list box. The Status field appears in the Change Request section on the main Change Request page.

Select a value from the Category drop-down list box to indicate the status category of each status you define. The Change Request Audit History will display the Closed Date and Time and the User ID and name when the status of the Change Request has been changed to a status whose category value is *Closed* or *Canceled.*

Setting Up Change Request Status Transitions

Access the Status Transition page (Set Up CRM, Product Related, Change Management, Status Transition, Status Transition).



Status Transition page

Use this page to build rules to automatically change the status of a change request when certain conditions are met or initiate other events when certain conditions are true.

Select a value from the Status From drop-down list box to indicate the initial status of the change request. Select a value from the Status To drop-down list box that you want the system to use when a certain condition is met or initiate a certain action when a user changes the status.

Click the Edit Condition link to select the terms that you want the system to use to change the status of the change request or alter the fields on the change request.

When you click the Select Term link on the Edit Condition page, use only the terms that appear under the Change Request folder.

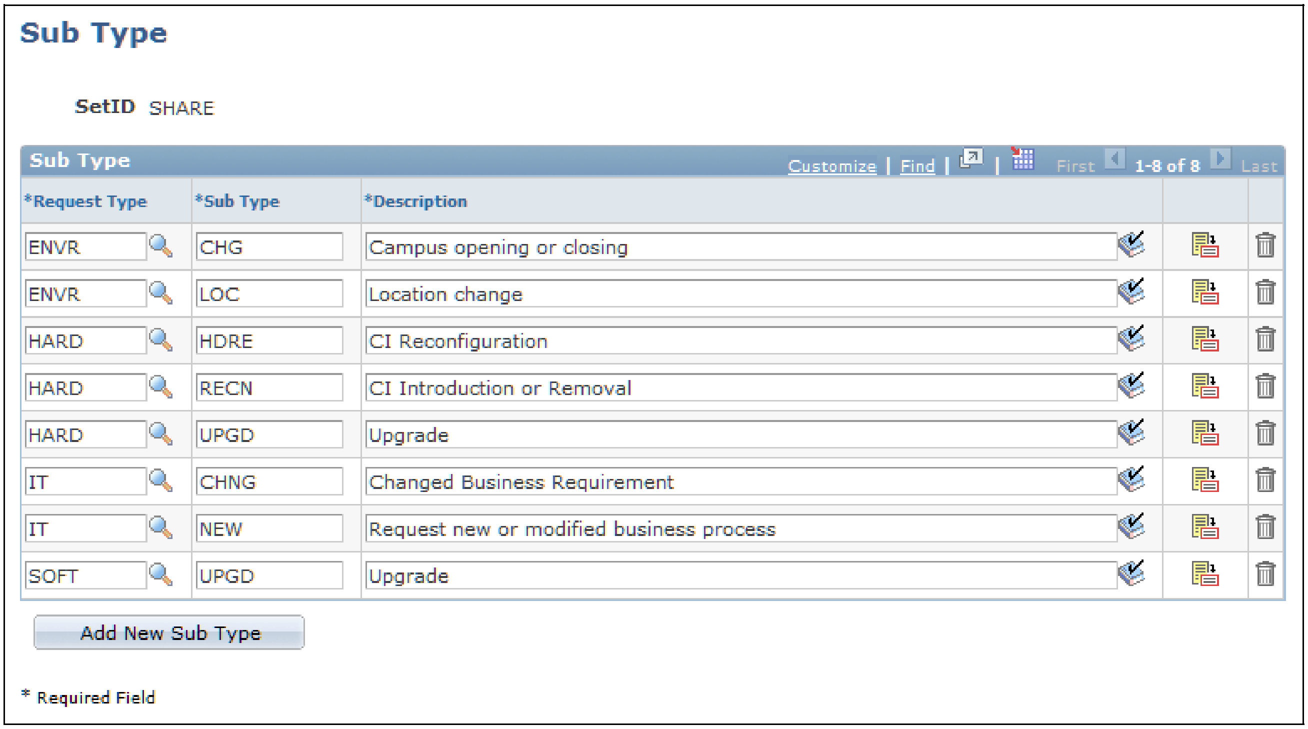
Note. When the transition condition is true, the system triggers AAF actions. For example, when the status of the change request changes from *New* to *Approved* and the Priority is *Emergency*, then this transition condition will be true and AAF will initiate an action when the change request is saved. The system checks all status transitions at save time to determine if they are true and sets off any AAF actions that are associated with the new condition.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Setting Up Change Request Subtypes

Access the Sub Type page (Set Up CRM, Product Related, Change Management, Sub Type, Sub Type).



Sub Type page

Request Type Select a request type.

Sub Type Enter a subtype.

Description Enter a description for the subtype that you want to appear on the Change Request page in the Sub Type drop-down list box. The Sub Type field appears in the Change Request section on the main Change Request page.

Setting Up Change Management Business Units

To set up Change Management business units, use the Change Management Definition (RG_BUSINESS_UNIT) component.

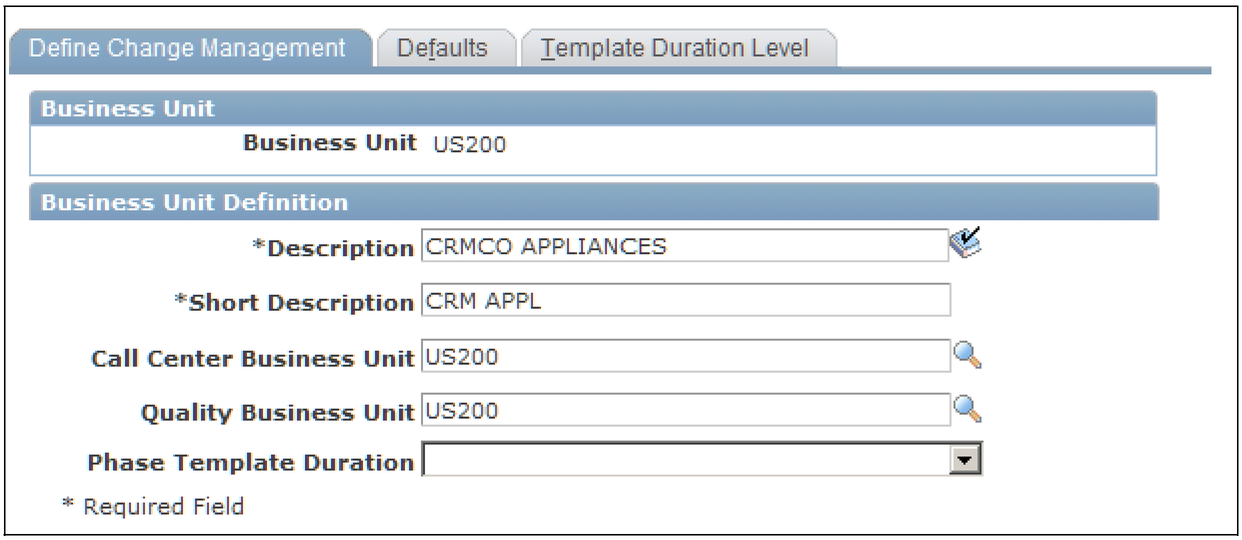
This section discusses how to set up Change Management business units.

Page Used to Set Up Change Management Business Units

Page Name	*Definition Name*	*Navigation*	*Usage*
Define Change Management	BUS_UNIT_TBL_RG	Set Up CRM, Business Unit Related, Change Management, Change Management Definition	Define business rules for a call center business unit.

Setting Up Change Management Business Units

Access the Define Change Management page (Set Up CRM, Business Unit Related, Change Management, Change Management Definition).



Define Change Management page

Business Unit

Enter a business unit identifier. To maximize system performance, always use exactly five characters.

Short Description

Enter the description that will appear on the Case page and other places where the business unit appears.

Call Center Business Unit

Select the default call center business unit to use when selecting a case to relate to a change request.

Quality Business Unit

Select the default PeopleSoft Quality Management business unit to use when selecting a case to relate to a change request.

Phase Template Duration

Select either *Phase Level* or *Task Level.* Both phases and tasks can have durations. Your selection in this field tells the phase template load process whether to use the phase durations or task durations when loading phases and tasks for a change request. This functionality provides a way to define templates to have the flexibility for either phase or task duration calculations.

If you do not select a template duration, the system defaults the value in this field to *Phase Level.*

Note. If you define duration at the task level, the system enters both a start date and an end date using that task duration calculated for the change request. This provides flexibility to define templates that have both parallel and dependant (sequential) tasks on a change request when doing a template load. You can still, however, manually add phases and tasks where tasks can be parallel or dependent.

Setting Up Change Management Defaults

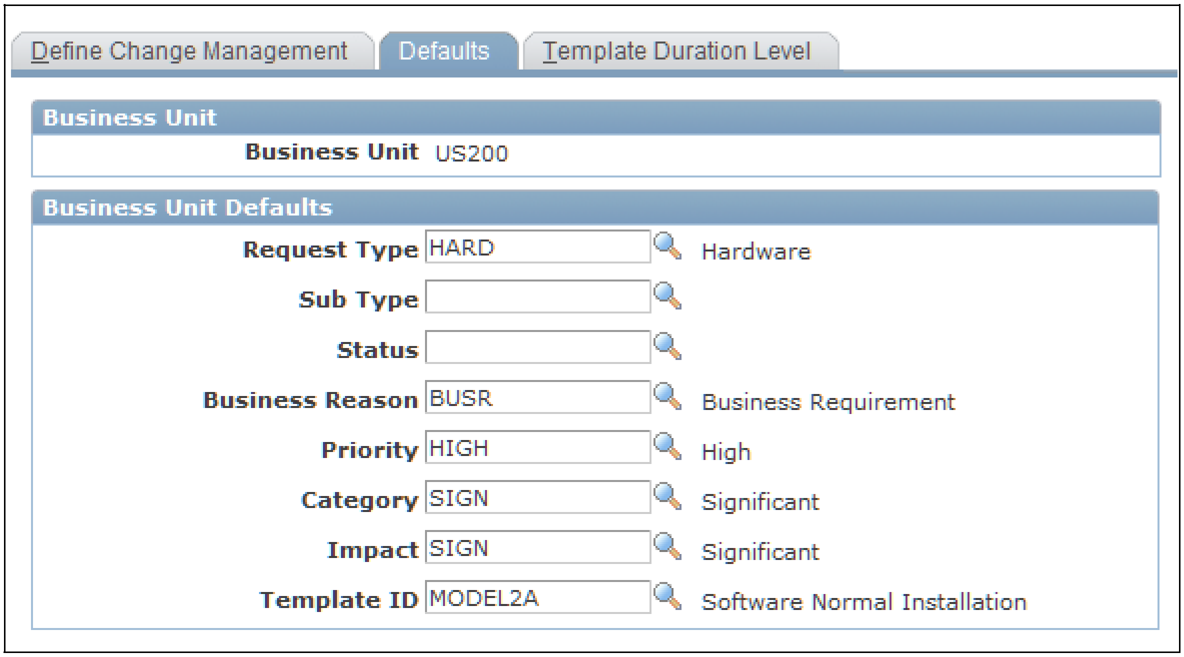
This section discusses how to set up Change Management defaults.

Page Used to Set Up Change Management Defaults

Page Name	*Definition Name*	*Navigation*	*Usage*
Defaults	BUS_UNIT_RG_DEF	Set Up CRM, Business Unit Related, Change Management Definition, Defaults	Set up Change Management defaults.

Setting Up Change Management Defaults

Access the Change Management Business Units - Defaults page (Set Up CRM, Business Unit Related, Change Management Definition, Defaults).



Defaults page

Request Type	Select the default request type for a new change request.
Sub Type	Select the default subtype for a new change request.
Status	Select the default status for a new change request.
Business Reason	Select the default business reason for a new change request
Priority	Select the default priority for a new change request.
Category	Select the default category for a new change request.
Impact	Select the default case type for a new change request.
Template ID	Select the default template ID for a new change request.

Setting Up Template Duration Levels

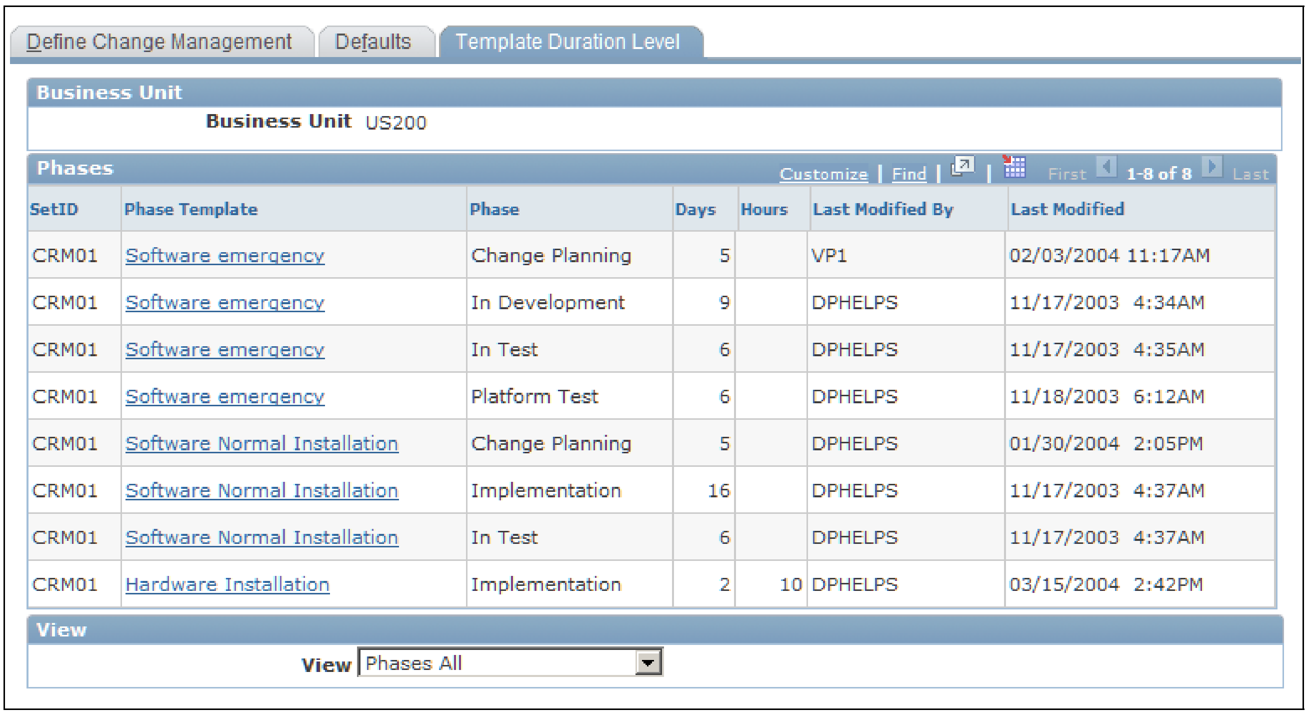
This section discusses how to set up template duration levels.

Page Used to Set Up Template Duration Levels

Page Name	*Definition Name*	*Navigation*	*Usage*
Template Duration Level	BUS_UNIT_DURLVL_RG	Set Up CRM, Business Unit Related, Change Management Definition, Template Duration Level	Instruct the system on which tasks or phases to display on the Change Request page.

Setting Up Template Duration Levels

Access the Template Duration Level page (Set Up CRM, Business Unit Related, Change Management Definition, Template Duration Level).



Template Duration Level page

Use the View field to review phases and tasks that have been set up in advance. You can use this field to filter tasks and phases with and without durations. You can also use this field to view either all tasks or all phases that are available for selection on the Change Request page. This page is informational only.

To access the Task Group Template page for a particular task, click the Task Group Template link. To access the Phase Template page for a particular phase, click the Phase Template link. These links appear based on the value you select in the View field.

Once you access the Task Group Template page or the Phase Template page, you can change the tasks or phases that appear. The changes appear when you return to the Template Duration Level page.

Setting Up Phase Templates

To set up phase templates, use the Phase Template Use (RG_UD_PHS_MODEL) and Phase Template (RG_UD_MODEL) components.

This section discusses how to:

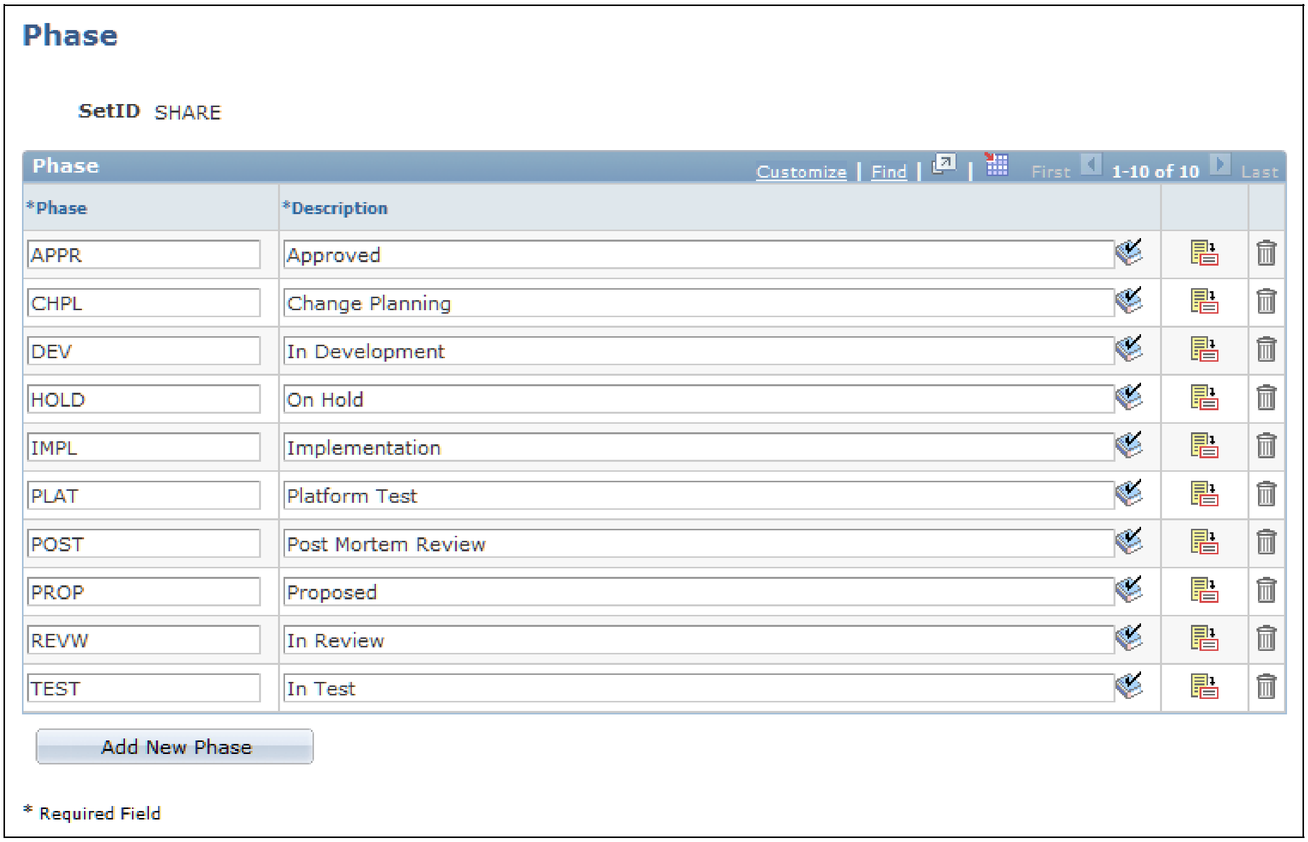
- Create phase templates.
- Define task group templates.
- Define phase templates.
- Set up phase template use.

Pages Used to Create a Phase Template

Page Name	***Definition Name***	***Navigation***	***Usage***
Phase	RG_UD_REQ_STATE	Set Up CRM, Product Related, Change Management, Phase	Create phases. These phases appear in the Phase drop-down list box on the Phase Template page.
Task Group Template	RB_TSK_GRP_TPL	Set Up CRM, Common Definition, Task Management, Task Group Template, Task Group Template	Define task group templates. You associate a task group template to a phase on the Phase Template page. See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Tasks."
Phase Template	RG_UD_PHS_MODEL	Set Up CRM, Product Related, Change Management, Phase Template, Phase Template	Create the phase template. Identify the phases and the phases' task group templates that you want to associate with the phase template.
Phase Template Use	RG_UD_PHS_MODL_USE	Set Up CRM, Product Related, Change Management, Phase Template Use, Phase Template Use	Instruct the system on which phase templates to display when entering a change request for a specific business unit.

Creating Phase Templates

Access the Phase page (Set Up CRM, Product Related, Change Management, Phase).



Phase page

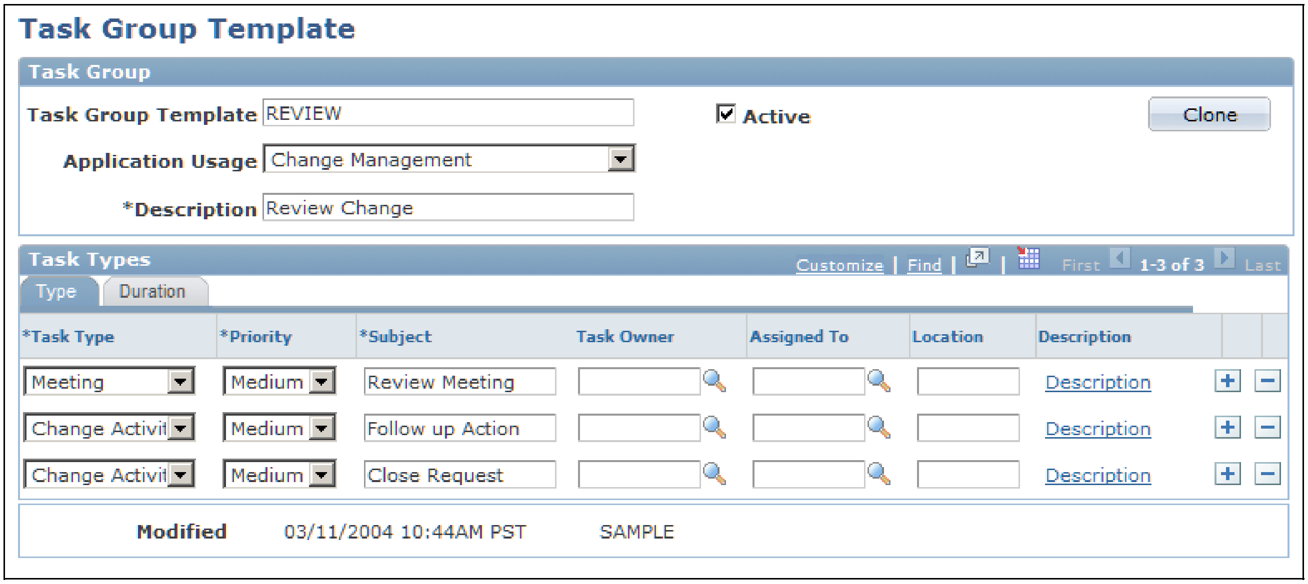
Phase

These phases appear in the Phase drop-down list box in the Phase Summary section on the Change Request page.

Add New Phase	Click to add a new phase to this setID.
	Click the Datetime Added icon to view when the phase was last added or modified by a user.

Defining Task Group Templates

Access the Task Group Template page (Set Up CRM, Common Definition, Task Management, Task Group Template, Task Group Template).



Task Group Template page

Specify the task type, priority, description, task owner, assigned to, and location of each task that is part of the task group. Select the Duration tab to enter task level duration information, including days, hours, and start use codes.

Start Use Code

Select from these values:

Current Phase Start: Task start date is equal to the current phase start date.

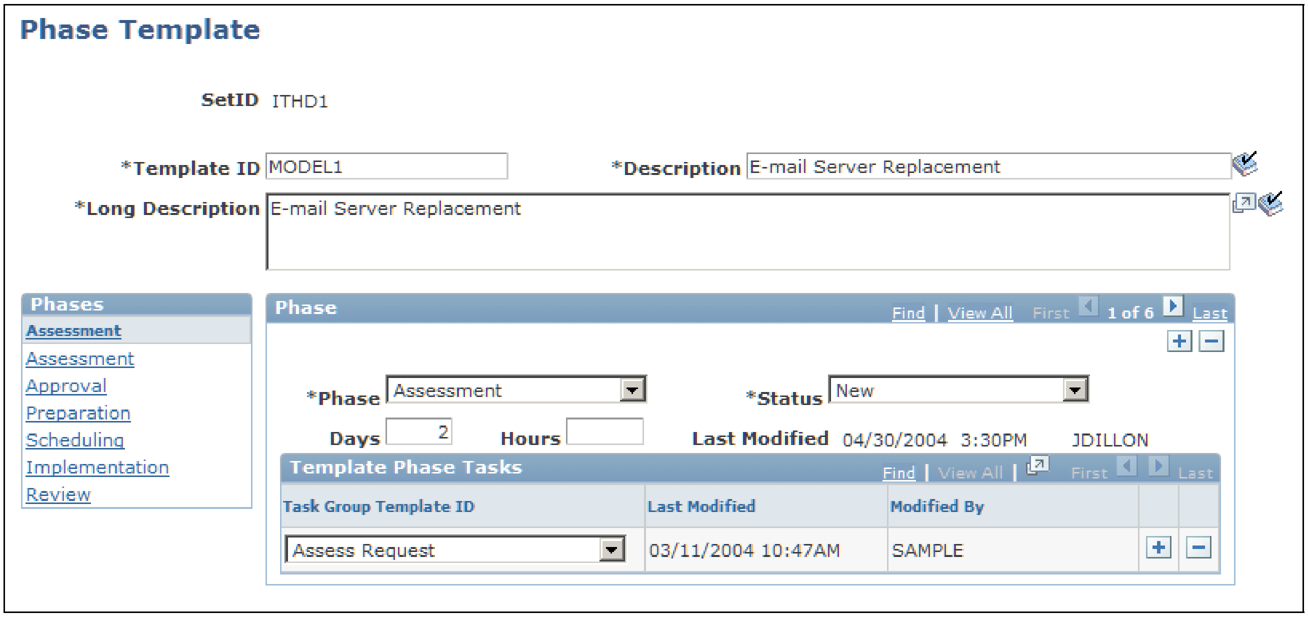
Next in Sequence: Task start date is equal to the prior task's end date.

Prior Phase Start: Task start date is equal to the previous phase start date.

Prior Task Start: Task start date is equal to the prior task start date.

Defining Phase Templates

Access the Phase Template page (Set Up CRM, Product Related, Change Management, Phase Template, Phase Template).

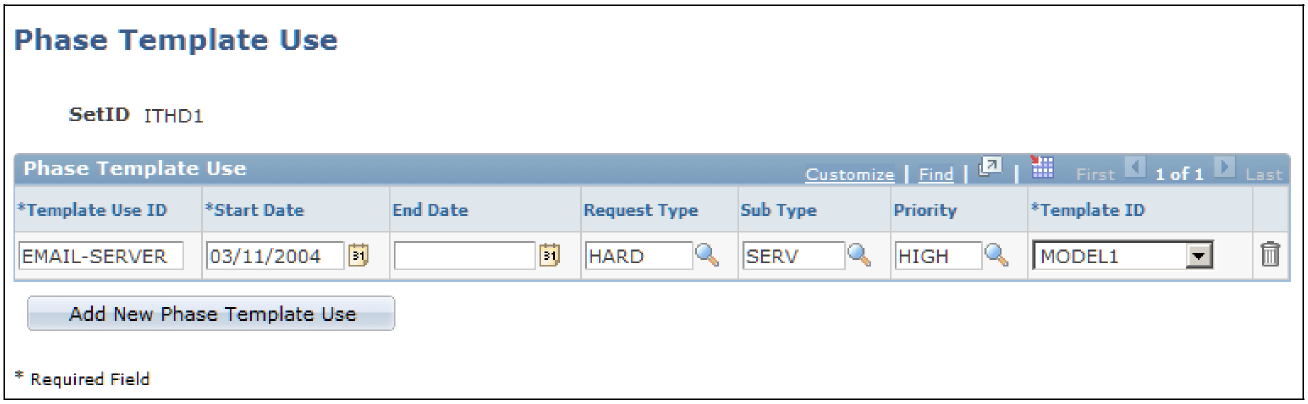


Phase Template page

Template ID	Enter an abbreviation for the phase template that you are creating.
Description and **Long Description**	Enter text to describe the phase template that you are adding to the system.
Phase	Select a phase to associate with this phase template. To set up phases, select Set Up CRM, Product Related, Change Management, Phase.
Status	Select a status. This status will be associated with the task or series of tasks that are tied to this phase.
Days and **Hours**	Enter the number of days and hours that the phase should take.
Task Group Template ID	Select the task group template that you want to associate with this particular phase of the template.

Setting Up Phase Template Use

Access the Phase Template Use page (Set Up CRM, Product Related, Change Management, Phase Template Use, Phase Template Use).



Phase Template Use page

The Phase Template Use page enables you to vary templates of the same type based on how critical the change request is to the organization. For example, while certain documentation and approval levels may be required for a medium priority change request, some organizations may choose to skip some tasks or approvals for an emergency change request.

When a template is automatically populated into a change request, the assignment engine is invoked for each task, and the system recommends resources for each generated task. The change manager can manually update task assignments from either the Tasks page on the change request or from Task Management. Alternatively, the change manager can manually build phases and tasks when the change request is approved.

Template Use ID

Enter the name of the template that you set up on the Task Group Template page (select Set Up CRM, Common Definitions, Task Management, Task Group Template).

Start Date and **End Date**

Use the start and end dates to activate or inactivate a given phase template use row.

For example, if you wanted to create another row that loaded a different template ID based on the same type, sub type, and priority, you could give the MODEL3A row an end date and then insert a new row with the same type, sub type, and priority but with a new template ID.

Request Type

Select the type of change request that you want the system to look for on the Change Request page.

Sub Type

Select the subtype that you want the system to look for on the Change Request page.

Priority

Select the priority that you want the system to look for on the Change Request page.

Template ID

Select the template ID that you want the system to use on the change request.

Setting Up the Task Type Role Map

To set up the Task Type Role map, use the Task Type Role Map (RG_UD_TSK_ROLE_GBL) component.

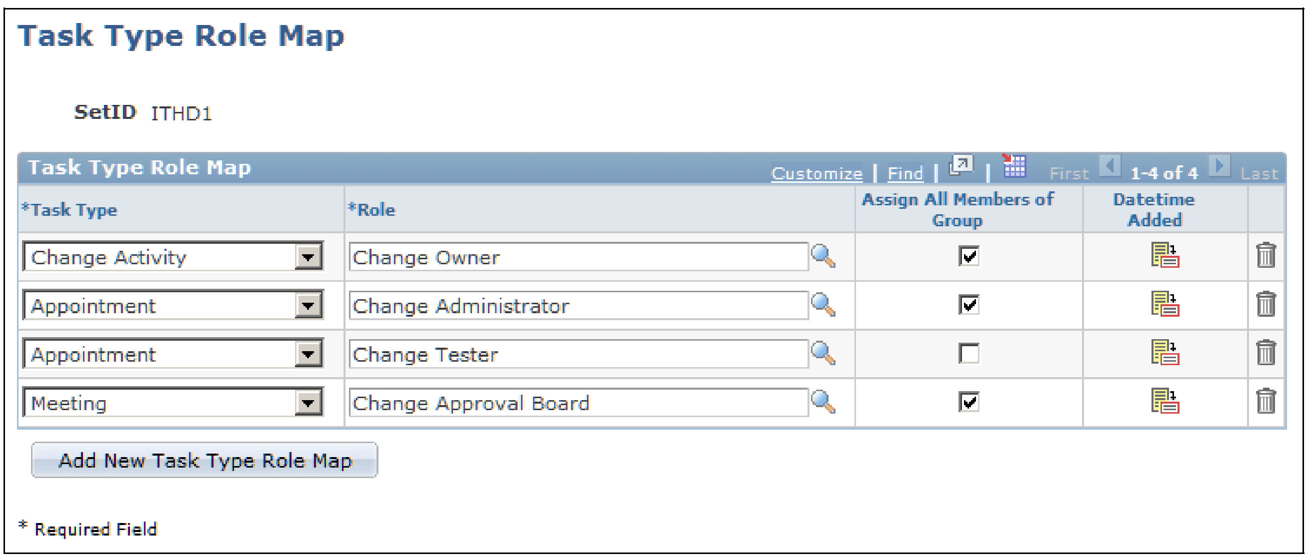
This section discusses how to set up the Task Type Role map.

Page Used to Set Up the Task Type Role Map

Page Name	***Definition Name***	***Navigation***	***Usage***
Task Type Role Map	RG_UD_TSK_ROLE	Set Up CRM, Product Related, Change Management, Task Type Role Map	Create one-to-one mapping between task types and roles in Change Management.

Setting the Task Type Role Map

Access the Task Type Role Map page (Set Up CRM, Product Related, Change Management, Task Type Role Map).



Task Type Role Map page

Task Type Role Map

Task Type Select a task type.

Task types are set up in Task Management under Set Up CRM, Common Definitions, Task Management, Task Type. They enable users to categorize tasks.

Role	Select a management role. Roles, which are implemented using PeopleTools security, provide the assignment engine with the ability to select and assign all or one member of a provider group that has its role mapped to a task type for tasks that are associated with a change request. **Note.** Only security roles are listed: role queries are not permitted here.
Assign All Members of Group	Select if you want all members of a provider group to be associated with a particular task type.
Add New Task Type Role Map	Click this button to add a new row to the Task Type Role Map section.

Chapter 7

Setting Up PeopleSoft Quality Management

This chapter provides an overview of PeopleSoft Quality Management business units and discusses how to:

- Define PeopleSoft Quality Management business units.
- Set up user codes.
- Set up products.

Understanding PeopleSoft Quality Management Business Units

PeopleSoft Quality Management business units enable you to organize defects and fixes to correspond with distinct operational entities within your business. Segmenting your operation by business units facilitates filtering and reporting functionality. Each quality management business unit is also linked to a Change Management business unit and a Call Center business unit.

Defining PeopleSoft Quality Management Business Units

To define PeopleSoft Quality Management business units, use the Quality Definition (RQ_BUS_UNIT_TBL) component.

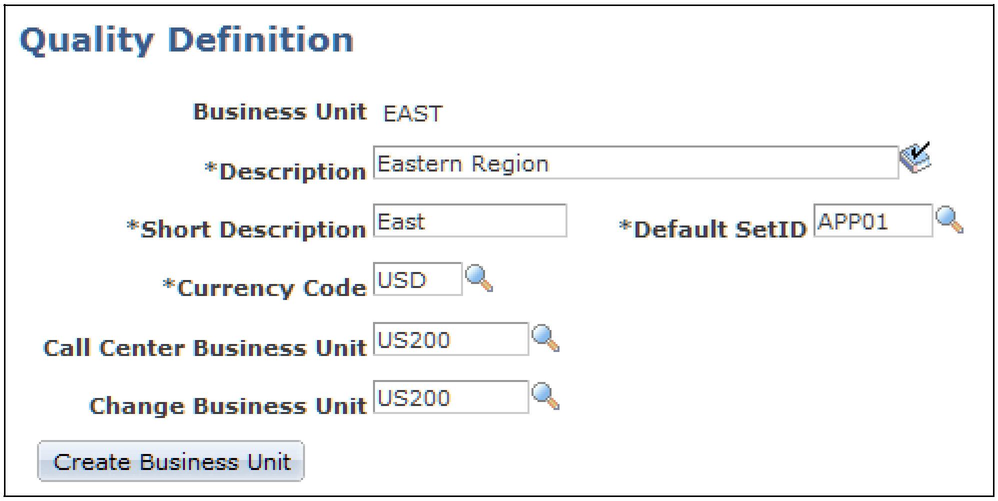
This section discusses how to define PeopleSoft Quality Management business units.

Page Used to Define PeopleSoft Quality Management Business Units

Page Name	***Definition Name***	***Navigation***	***Usage***
Quality Definition	RQ_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Quality Definition	Define PeopleSoft Quality Management business units.

Defining PeopleSoft Quality Management Business Units

Access the Quality Definition page (Set Up CRM, Business Unit Related, Quality Definition).



Quality Definition page

Business Unit

Displays the business unit abbreviation that you selected or entered before you accessed this page.

Default SetID

Select the default setID that you want to associate with the business unit.

Note. The system displays this field only when you define a new business unit that has not already been defined elsewhere within the PeopleSoft CRM system.

Currency Code

Select the default monetary unit in which you conduct transactions in this business unit.

Call Center Business Unit

Select the call center business unit that you want to associate with this PeopleSoft Quality Management business unit.

Change Business Unit

Select the change management business unit that you want to associate with this PeopleSoft Quality Management business unit.

Create Business Unit

Click to save and create the new business unit. Clicking this button is the same as clicking the Save button.

Note. The system displays this button only when you define a new business unit that has not already been defined elsewhere within the PeopleSoft CRM system.

Setting Up User Codes

To set up user codes, use the Defect Relationship Types (RQ_RELATION_TYPE), Defect Causes (RQ_UD_DEF_SUSPEC), Defect Symptoms (RQ_UD_DEF_SYMPTM), Defect Status State (RQ_UD_ST_REASON), Defect Status State Reason (RQ_UD_ST_ST_RSN), Defect Status (RQ_UD_ST_STATUS), and Status Combinations (RQ_UD_STAT_COMBO) components.

This section discusses how to:

- Define defect symptom codes.
- Define defect cause codes.
- Define defect status codes.
- Define status states.
- Define status-state reasons.
- Define valid status-state combinations.
- Define defect relationship types.

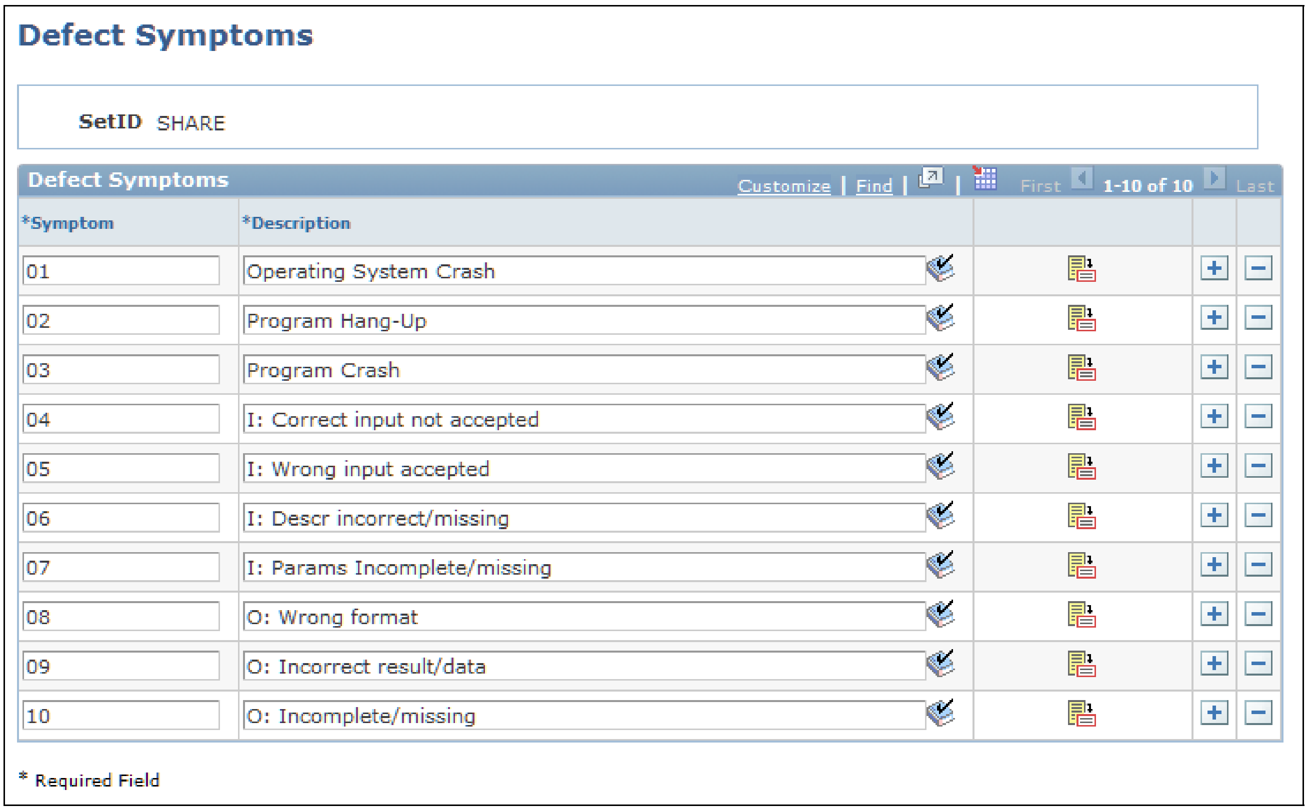
Pages Used to Set Up User Codes

Page Name	***Definition Name***	***Navigation***	***Usage***
Defect Symptoms	RQ_UD_DEF_SYMPTM	Set Up CRM, Product Related, Quality Management, Defect Symptoms, Defect Symptoms	Define defect symptom codes to provide consistent problem symptom descriptions and to facilitate data entry.
Defect Causes	RQ_UD_DEF_SUSPEC	Set Up CRM, Product Related, Quality Management, Defect Causes, Defect Causes	Define defect cause codes to provide consistent potential problem cause descriptions and to facilitate data entry.
Defect Status	RQ_UD_ST_STATUS	Set Up CRM, Product Related, Quality Management, Defect Status, Defect Status	Define defect status codes.
Defect Status State	RQ_UD_ST_REASON	Set Up CRM, Product Related, Quality Management, Defect Status State, Defect Status State	Define status states to describe defect status more specifically.
Defect Status State Reason	RQ_UD_ST_ST_RSN	Set Up CRM, Product Related, Quality Management, Defect Status State Reason, Defect Status State Reason	Define status-state reason codes to explain why a defect is in a particular status state.
Status Combinations	RQ_UD_STAT_COMBO	Set Up CRM, Product Related, Quality Management, Status Combinations, Status Combinations	Define status-state combinations to control permissible transitions.

Page Name	*Definition Name*	*Navigation*	*Usage*
Defect Relationship Types	RQ_RELATION_TYPE	Set Up CRM, Product Related, Quality Management, Defect Relationship Types, Defect Relationship Types	Define defect relationship types to describe dependencies and relationships among defects.

Defining Defect Symptom Codes

Access the Defect Symptoms page (Set Up CRM, Product Related, Quality Management, Defect Symptoms, Defect Symptoms).



Defect Symptoms page

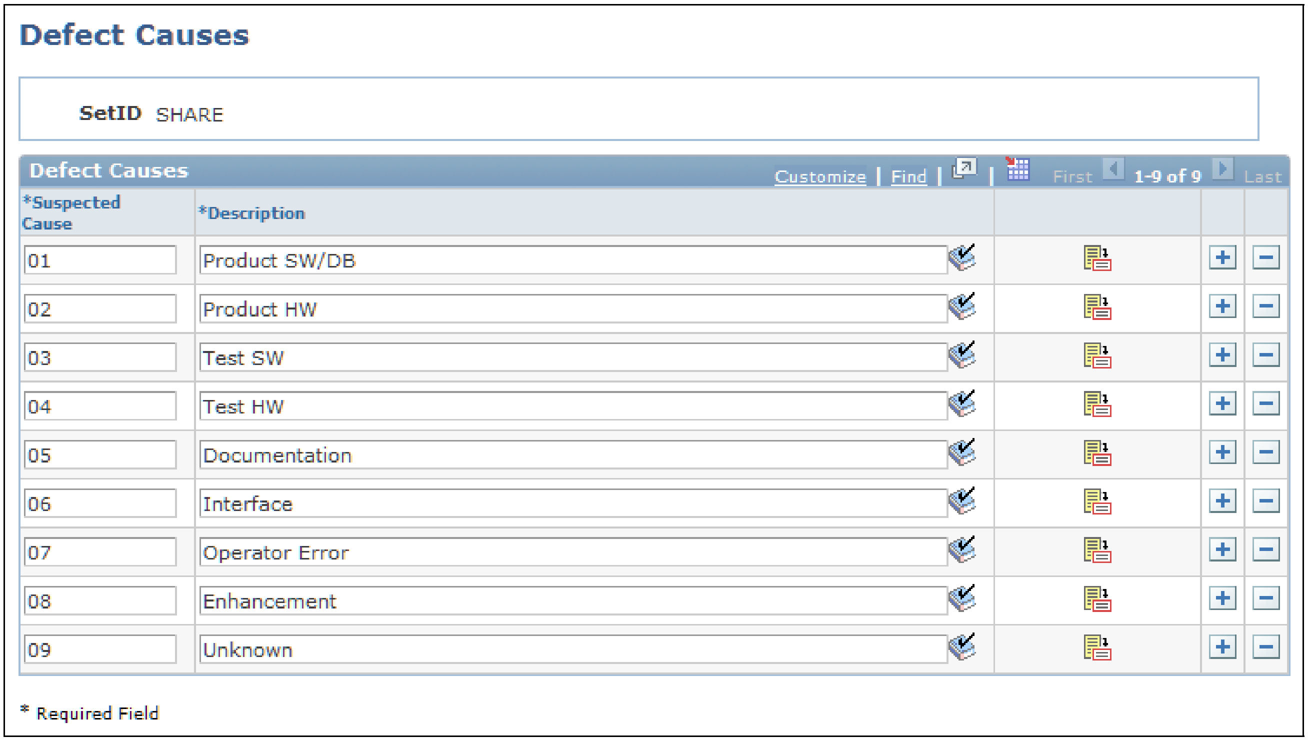
Note. The system provides sample field values. You can configure these codes to match product offerings or meet business objectives.

Defect symptom codes describe common symptoms that your customers might experience. For example, when a faulty motherboard causes a computer to crash, the symptom is the crash.

Symptom and **Description**	Enter a unique code and description that represent the defect symptom.

Defining Defect Cause Codes

Access the Defect Causes page (Set Up CRM, Product Related, Quality Management, Defect Causes, Defect Causes).



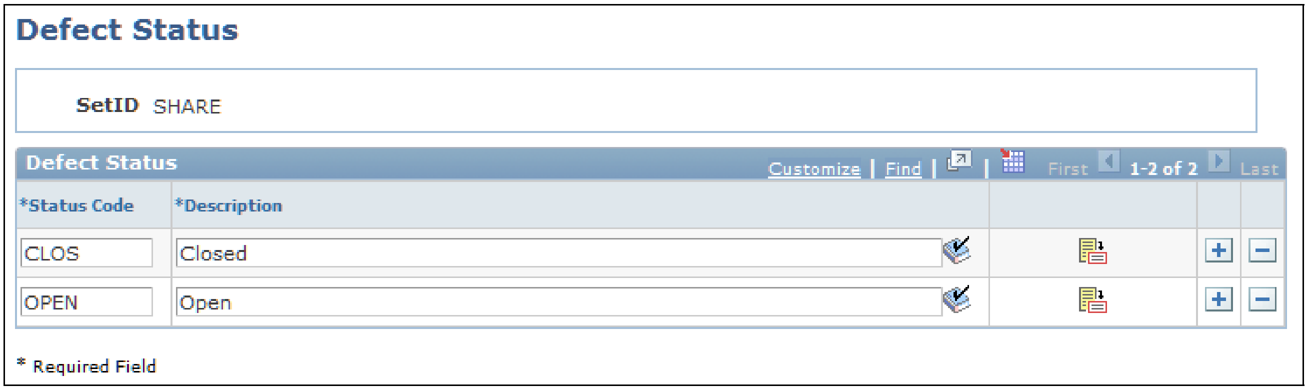
Defect Causes page

Defect cause codes describe the actual cause of a problem. For example, when a loud squealing noise comes from the bottom of a refrigerator, the actual cause is a bad compressor bearing.

Suspected Cause and **Description** — Enter a unique code and description that represent the suspected cause of the defect.

Defining Defect Status Codes

Access the Defect Status page (Set Up CRM, Product Related, Quality Management, Defect Status, Defect Status).



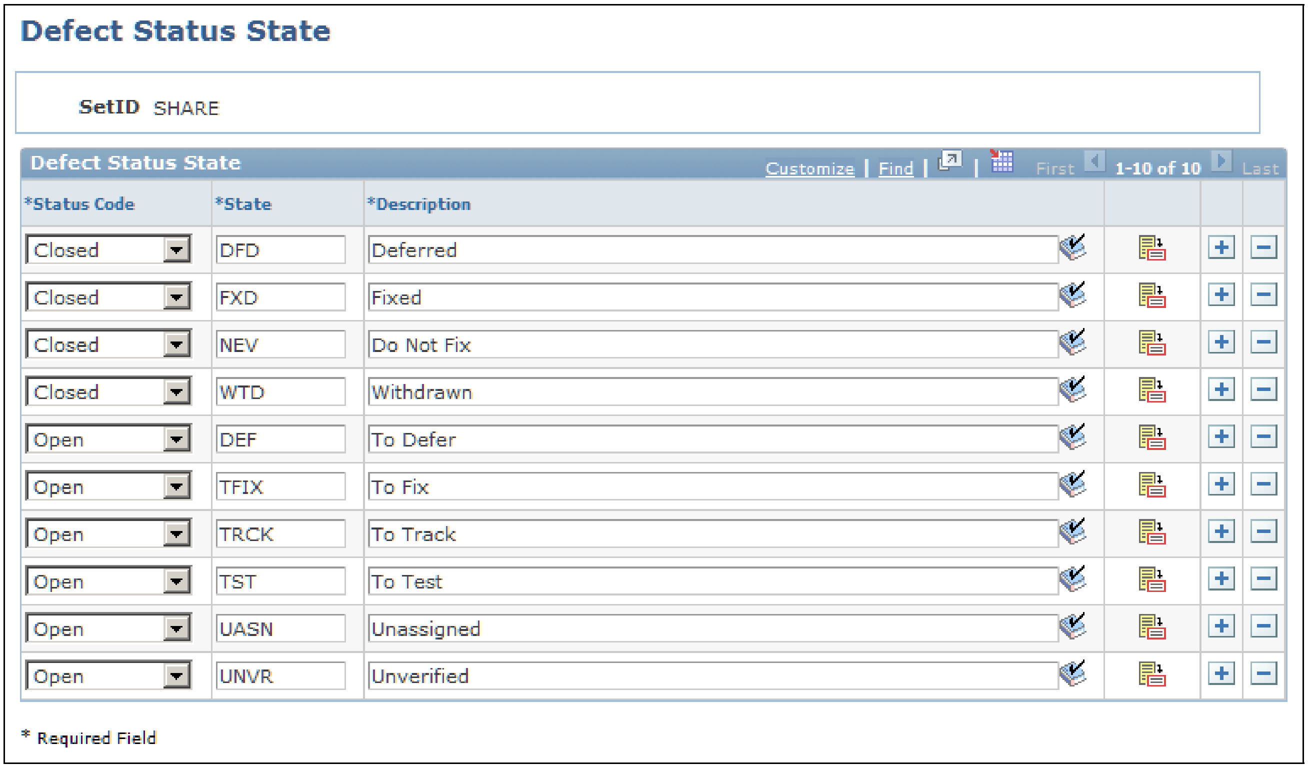
Defect Status page

Defect status codes describe the defect's most fundamental status in the problem resolution (fix) cycle. The values *OPEN* and *CLOS* (closed) are delivered with the system. Add additional values as required; however, the delivered values should be adequate for most needs.

Status Code and **Description**	Enter a unique four-character code and description that represent the defect status.

Defining Status States

Access the Defect Status State page (Set Up CRM, Product Related, Quality Management, Defect Status State, Defect Status State).



Defect Status State

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Defect Status State Customize | Find | First 1-10 of 10 Last

*Status Code	*State	*Description
Closed	DFD	Deferred
Closed	FXD	Fixed
Closed	NEV	Do Not Fix
Closed	WTD	Withdrawn
Open	DEF	To Defer
Open	TFIX	To Fix
Open	TRCK	To Track
Open	TST	To Test
Open	UASN	Unassigned
Open	UNVR	Unverified

* Required Field

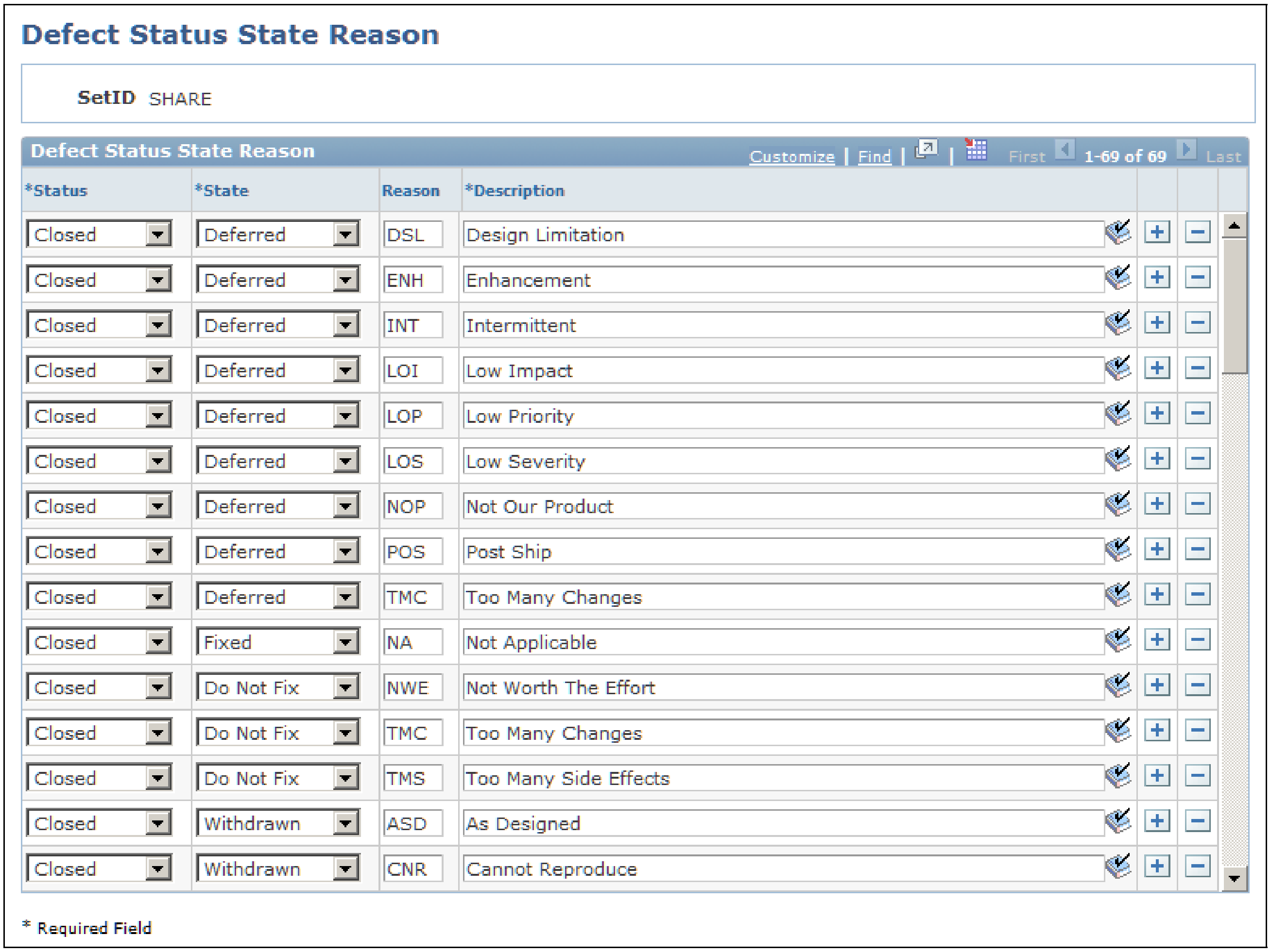
Defect Status State page

Status states define the defect's status in the resolution process more specifically than status codes. For example, when you close an enhancement request, you may do so because you have completed the process or because you decided not to enhance the product as requested. Each status state is linked to a valid status and is available on the Defect page when the corresponding status is chosen.

Status Code	Select the description of the defect's status in the resolution process. Delivered status options are: *Closed* and *Open.*Define status codes on the Defect Status page.
State and **Description**	Enter a unique code of up to four characters and a description to represent the status state.

Defining Status-State Reasons

Access the Defect Status State Reason page (Set Up CRM, Product Related, Quality Management, Defect Status State Reason, Defect Status State Reason).



Defect Status State Reason page

Use the Reason field to describe why a defect resolution has a particular status and state. One status-state combination might have several reasons. For example, a defect may be set with a status state of *Closed* - *Do Not Fix* because the product is no longer supported or because you have determined that the defect complaint should really be an enhancement request. Each status-state reason is linked to a status and state combination and is available on the Defect page when a user chooses the corresponding status and state.

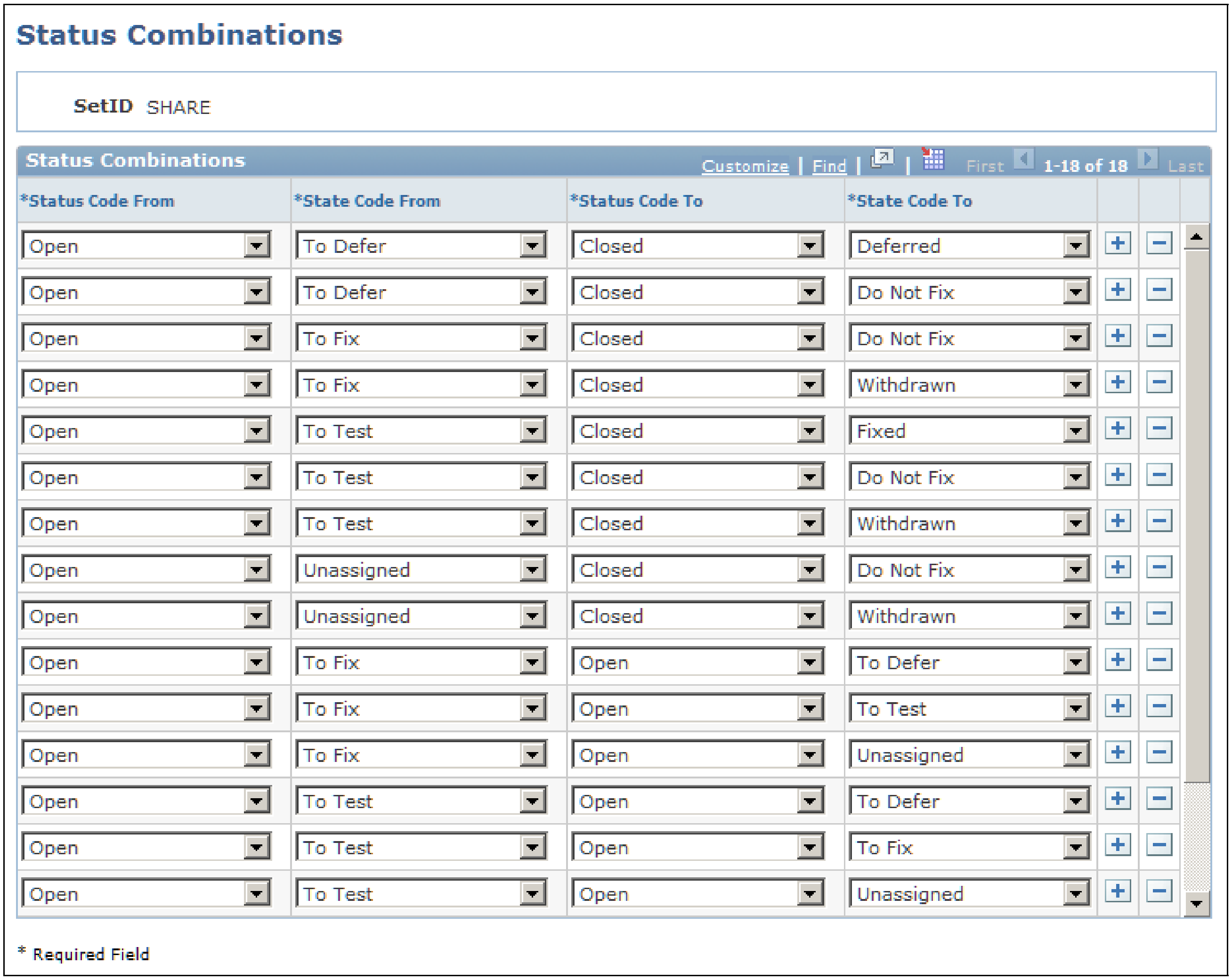
Status Select the description of the defect's status in the resolution process. Delivered status options are: *Closed* and *Open.* Define status codes on the Defect Status page.

State Select the state that you want to associate with the defect status. States define the defect's status in the resolution process more specifically than status codes. Select either *Deferred, Do Not Fix, Fixed,* or *Withdrawn.*

Reason and **Description** Enter a code of up to three characters and a description to further explain the reason for the status-state combination.

Defining Valid Status-State Combinations

Access the Status Combinations page (Set Up CRM, Product Related, Quality Management, Status Combinations, Status Combinations).



Status Combinations

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Status Combinations — Customize | Find | First 1-18 of 18 Last

*Status Code From	*State Code From	*Status Code To	*State Code To
Open	To Defer	Closed	Deferred
Open	To Defer	Closed	Do Not Fix
Open	To Fix	Closed	Do Not Fix
Open	To Fix	Closed	Withdrawn
Open	To Test	Closed	Fixed
Open	To Test	Closed	Do Not Fix
Open	To Test	Closed	Withdrawn
Open	Unassigned	Closed	Do Not Fix
Open	Unassigned	Closed	Withdrawn
Open	To Fix	Open	To Defer
Open	To Fix	Open	To Test
Open	To Fix	Open	Unassigned
Open	To Test	Open	To Defer
Open	To Test	Open	To Fix
Open	To Test	Open	Unassigned

* Required Field

Status Combinations page

As a defect or enhancement request moves thorough the resolution process, you want to change the status-state combination to reflect its progress. However, certain changes do not make sense. For example, if an enhancement request's status is *Open* - *Deferred*, you should not change it to *Closed* - *Fixed* without passing through the verify, fix, and test stages.

Use this page to control which transitions are permissible. Define combinations for all possible transitions, including reverse transitions. For example, if a software fix fails in testing, it must be returned to the developer. In this case, you need a valid status combination that allows the change to go from *Open* - *Fixed* back to *Open* - *To Test* in development.

Status Code From	Select the description of the beginning status code from the codes that you defined on the Defect Status page.

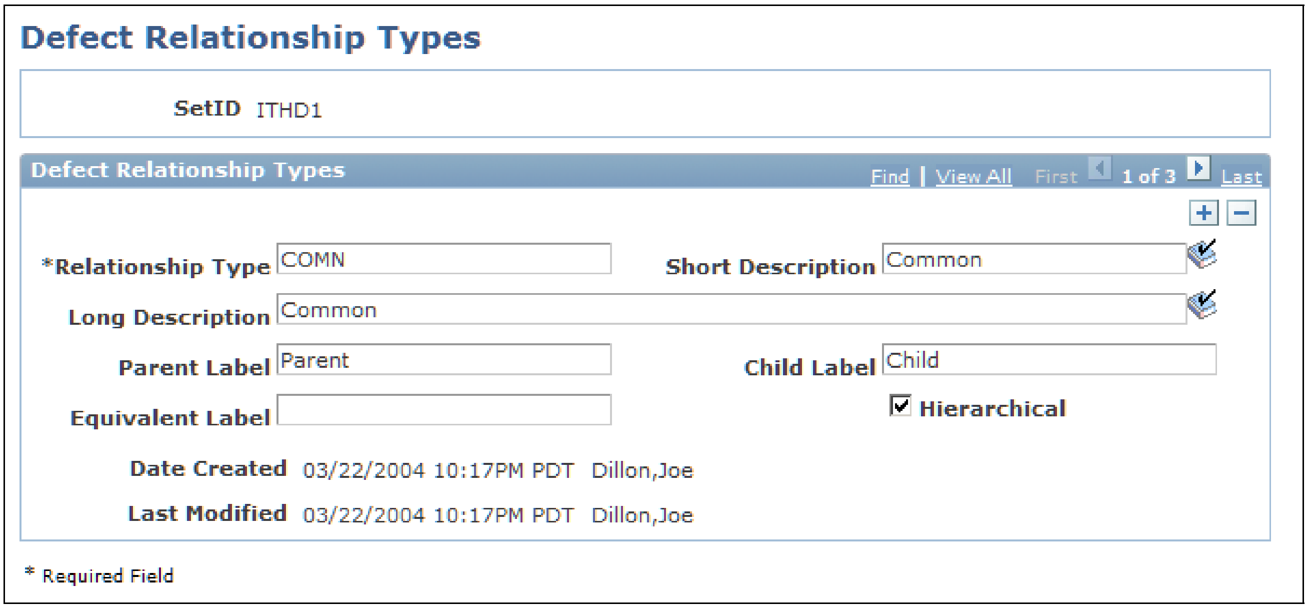
State Code From Select the description of the beginning state code from the codes that you defined on the Defect Status State page.

Status Code To Select the description of the new (after the combination change) status code from the codes that you defined on the Defect Status page.

State Code To Select the description of the new state code after the change from the codes that you defined on the Defect Status State page.

Defining Defect Relationship Types

Access the Defect Relationship Types page (Set Up CRM, Product Related, Quality Management, Defect Relationship Types, Defect Relationship Types).



Defect Relationship Types page

Sometimes, two or more defect cases are related to one another, or the solution to a defect may be dependent on the solution to a previous defect. Defect relationship types describe these dependencies. All defect relationships fall into the general categories of hierarchical or equivalent.

An *equivalent relationship* is two or more defects having the same cause. One fix resolves multiple cases. A *hierarchical relationship* is an instance when one case cannot be resolved without first resolving another.

Relationship Type Enter a unique code up to five characters to represent the relationship type.

Parent Label and **Child Label** If you are defining a hierarchical relationship, enter a label value for both the parent and the child defects. These labels are used on the Related Defects page to describe the relationship.

Equivalent Label If you are defining an equivalent relationship, enter a label value to appear on all related cases.

Hierarchical	Clear this check box to define an equivalent relationship type.

Setting Up Products

To set up products, use the Component Definitions (RQ_COMP_DEFN), Component Versions (RQ_PROD_VERS), and Component Types (RQ_UD_COMP_TYPE) components.

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

- Define component types.
- Define product components.
- Define component relationships.
- Define component versions.
- Define version environments.

Understanding Products and Components

Generally, every product consists of components, each of which may also consist of subcomponents. You use the Component Type page to break down products into component and subcomponent levels.

You can then combine components and subcomponents in a hierarchical relationship on the Component Definitions page. As changes are made in the combination of components and subcomponents, a different component definition of the product is created and distinguished from all others by a unique version definition. When you select a specific product version while creating a defect record, you can drill down to the correct components and subcomponents that you used to build that particular version.

For example, here is a simple breakdown of a laptop computer's components:

Example of laptop component hierarchy

At the least, a laptop computer is made up of a bottom casing and a top casing. One of the bottom casing's subcomponents is the keyboard, which is made up of several individual keys. The top casing has a liquid crystal display (LCD) screen as one of the subcomponents. As you can see, this breakdown could go on for many levels.

Suppose that you manufacture laptops, and you want to offer an improved LCD screen. The laptops that include the improved screen are a new version. As you create the version's component definition, the only change is the LCD screen, but that change means that the hierarchy of components is different. By attaching the new component definition to a new and unique component version, you are assured that the correct LCD screen is available as you drill down on the product components.

Note. Product definitions can become quite complex. Consult with product experts to obtain the information needed to complete the following pages.

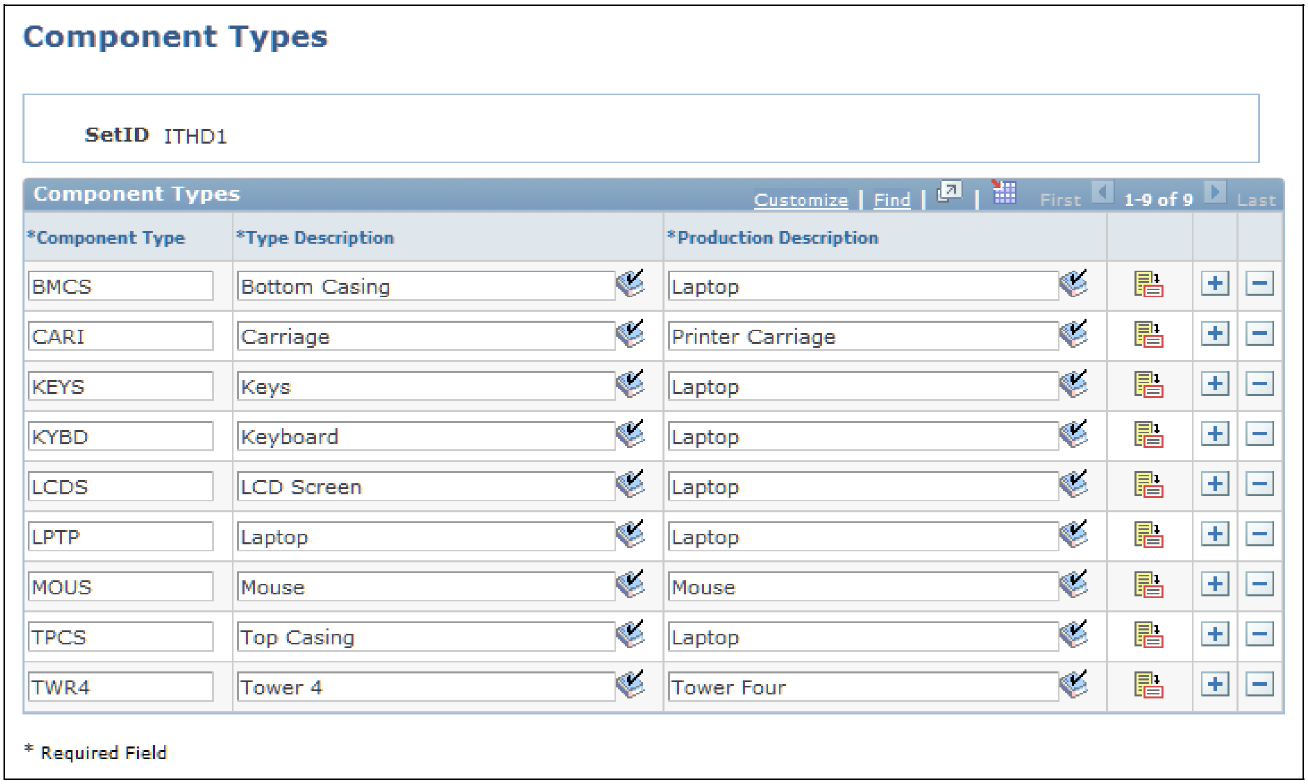
Pages Used to Set Up Products

Page Name	*Definition Name*	*Navigation*	*Usage*
Component Types	RQ_UD_COMP_TYPE	Set Up CRM, Product Related, Quality Management, Component Types, Component Types	Define general component types.

Page Name	***Definition Name***	***Navigation***	***Usage***
Component Definition	RQ_COMP_DEFN	Set Up CRM, Product Related, Quality Management, Component Definitions, Component Definition	Define product components.
Component Definitions - Relationships	RQ_COMP_PAR_LNK	Set Up CRM, Product Related, Quality Management, Component Definitions, Relationships	Define parent-child relationships between product components.
Version	RQ_PROD_VERS	Set Up CRM, Product Related, Quality Management, Component Versions, Version	Define distinct component versions.
Environments	RQ_PROD_VERS_ENV	Set Up CRM, Product Related, Quality Management, Component Versions, Environments	Define version environment details.

Defining Component Types

Access the Component Types page (Set Up CRM, Product Related, Quality Management, Component Types, Component Types).


Component Types

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Component Types — Customize | Find | First 1-9 of 9 Last

*Component Type	*Type Description	*Production Description
BMCS	Bottom Casing	Laptop
CARI	Carriage	Printer Carriage
KEYS	Keys	Laptop
KYBD	Keyboard	Laptop
LCDS	LCD Screen	Laptop
LPTP	Laptop	Laptop
MOUS	Mouse	Mouse
TPCS	Top Casing	Laptop
TWR4	Tower 4	Tower Four

* Required Field

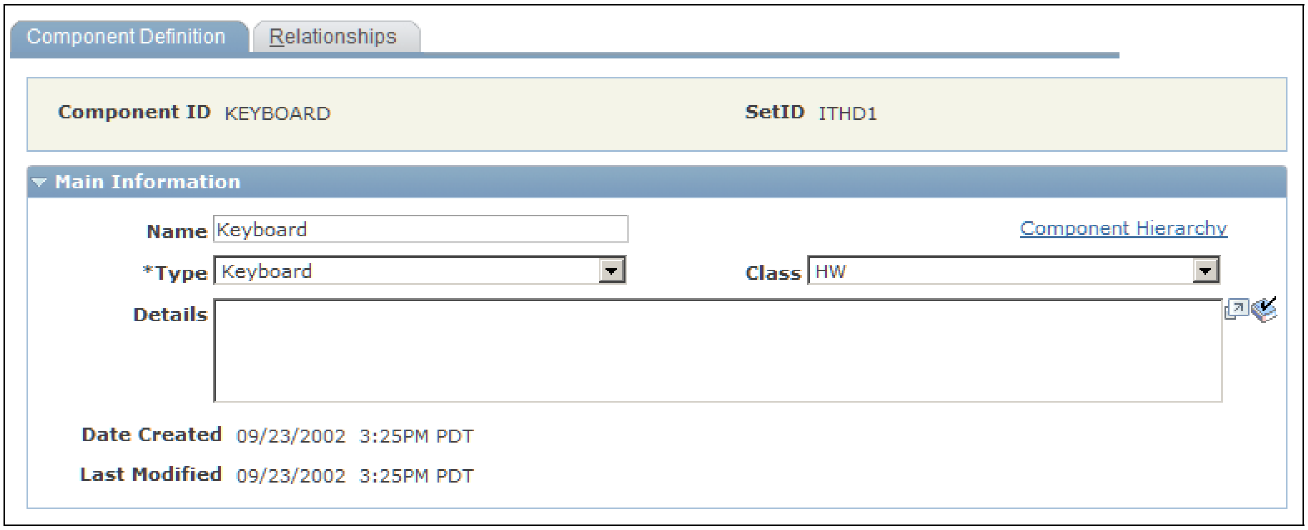
Component Types page

The component type is the most basic definition of a component. This general description can be used in multiple component definitions. For example, you might define a component type that represents all keyboards, or you might narrow the definition to only keyboards for laptops.

Component Type	Enter a unique code that represents the component specifically defined by the combination of the type and production descriptions. This field is limited to four characters.
Type Description	Briefly describe the component. This description appears in the component hierarchy display and on the main Defect page. You can also use it to describe the same component in multiple component definitions. For example, all laptop computers have a keyboard. The keyboards for each laptop model may differ, but they all have a keyboard of some type. The type description *keyboard* is a general description of the component that is used for all models.
Production Description	Briefly describe the product to which the component belongs. This field is informational and provides a means of further distinguishing a type description by associating it with a particular product or by adding further defining characteristics. For example, you can distinguish between a laptop keyboard and a desktop keyboard by changing the production description.

Defining Product Components

Access the Component Definition page (Set Up CRM, Product Related, Quality Management, Component Definitions, Component Definition).



Component Definition page

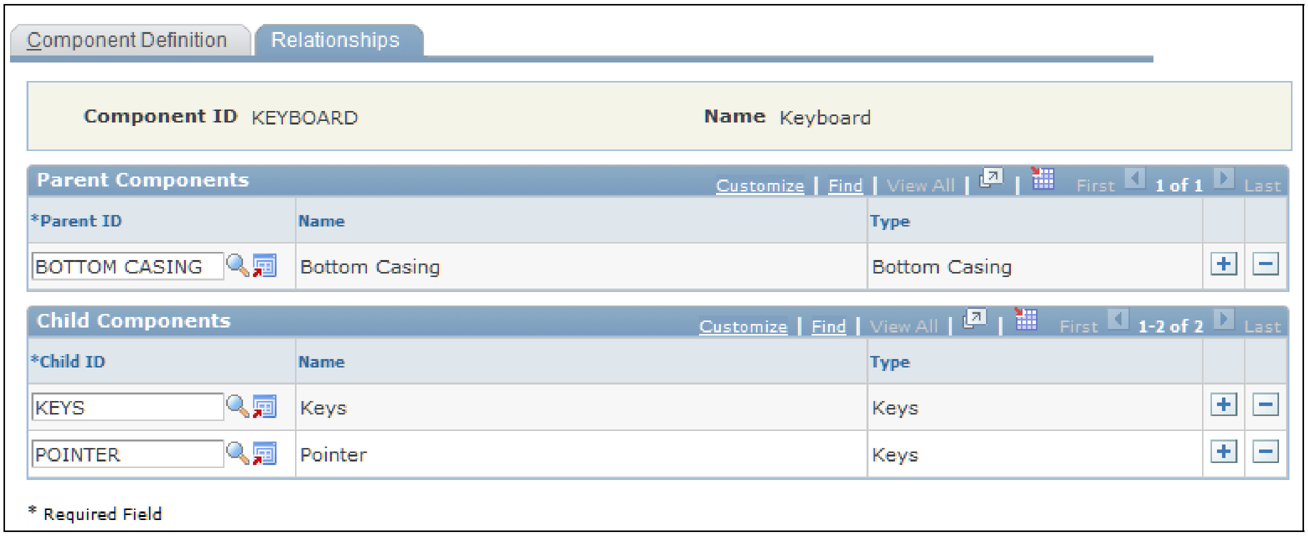
The component definition is a more specific description of a particular component. For example, you might have a laptop keyboard with gray keys and another with black keys. The component definition enables you to distinguish between the two keyboards.

The component definitions also show the level at which subcomponents are linked to other components in a child-to-parent relationship, creating a hierarchy that culminates in the product component definition.

Name	Enter the component name. This name is informational only and can be the same as the component ID or type description.
Component Hierarchy	Click this link to view the hierarchy of components.
Type	Select the type of component that you described in the Name field.
Class	Select a component class description. Values are: *Doc* (documentation), *HW* (hardware), *Service,Test,Third Party Doc* (third-party documentation), *Third Party HW* (third-party hardware), *Third Party SW* (third-party software), and *Third Party Service.*

Defining Component Relationships

Access the Relationships page (Set Up CRM, Product Related, Quality Management, Component Definitions, Relationships).



Relationships page

Component relationships define the component hierarchy. In the example of the laptop computer, the bottom casing includes the keyboard assembly, which is made up of individual keys. Thus, the bottom casing is the parent to the keyboard assembly, which, in turn, is the parent to the keys.

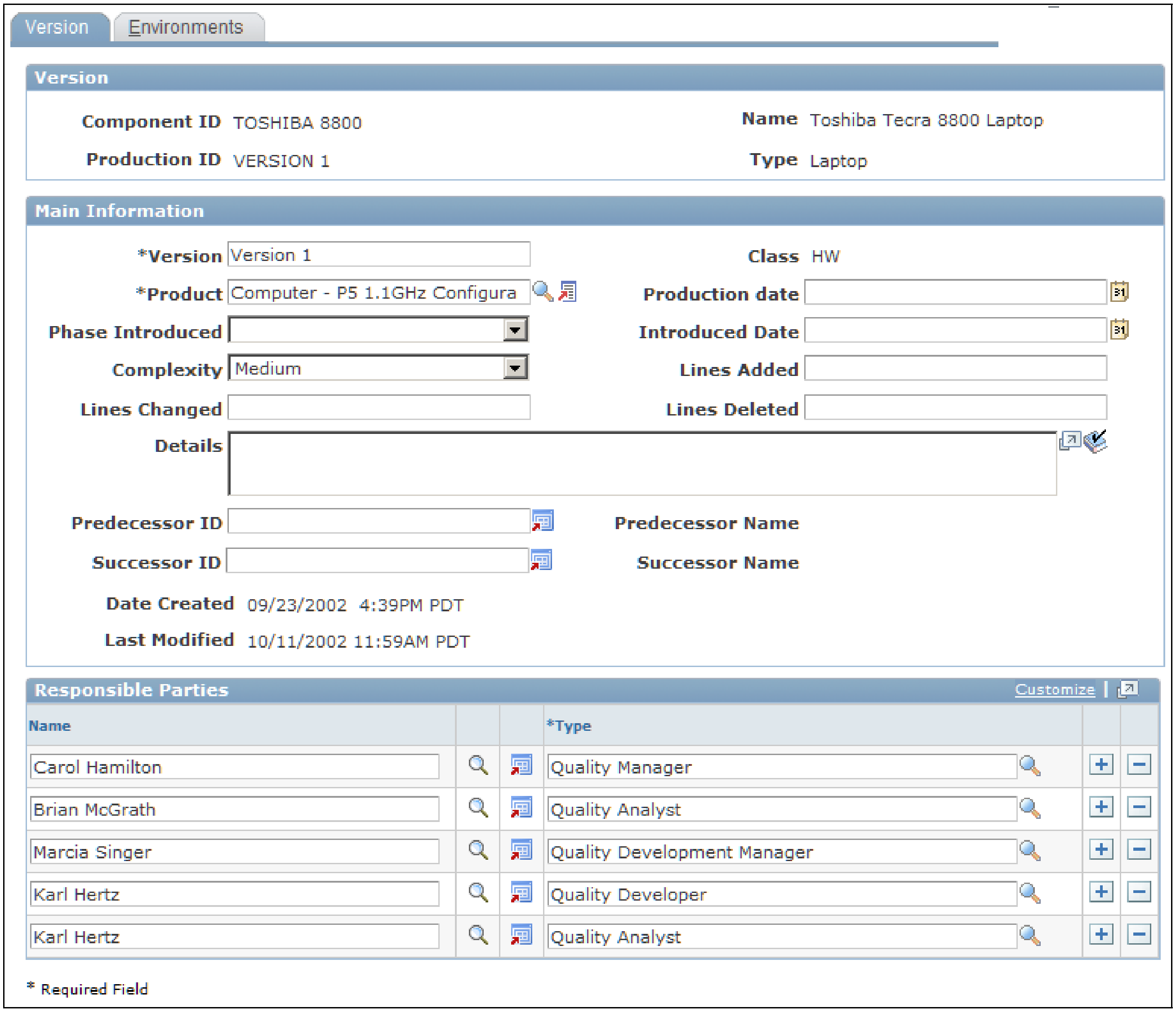
Parent ID	Select the parent component to which the defined component is related.
Name and **Type**	Displays the name and type of the selected parent component.
Child ID	Select the child component to which the defined component is related.
Name and **Type**	Displays the name and type of the selected parent component.

Note. To link components, both the component being linked and the component to which you are linking must have valid component definitions. If the component to which you are linking does not have a definition, you can create the definition by clicking the Component Definitions button.

To view the component relationship, return to the Component Definition page. Click the Component Hierarchy link to access the Component Hierarchy page. Click the Refresh button to display newly added components.

Defining Component Versions

Access the Version page (Set Up CRM, Product Related, Quality Management, Component Versions, Version).



Version page

Products consist of components. When one or more of these components changes, you refer to the changed product as a new *version.* PeopleSoft Quality Management enables you to uniquely identify different product versions by defining different component versions. Each version represents a unique product component definition.

Note. When creating a new value, the Production ID is in a free form text field. The Production ID is the link between the product and the version.

Main Information

Version	Enter a word or phrase to describe the version build.
Product	Select the product that is associated with the component.

Phase Introduced	Select the product development phase in which this component version was introduced. Values are: *Alpha, Analysis/Design, Beta, Concept, Implementation, Maintenance, Production, Requirements,* and *Retirement.*
Complexity	Select the level of complexity that best represents what it would take to fix a defect in the component.
Production Date and **Introduced Date**	Enter the dates the product was first produced and introduced to the market.
Lines Added, Lines Changed, and **Lines Deleted**	Enter the lines of code that were added, changed, or deleted in this version. These fields apply to software code.
Predecessor ID and **Successor ID**	Enter a predecessor and successor version, if applicable.

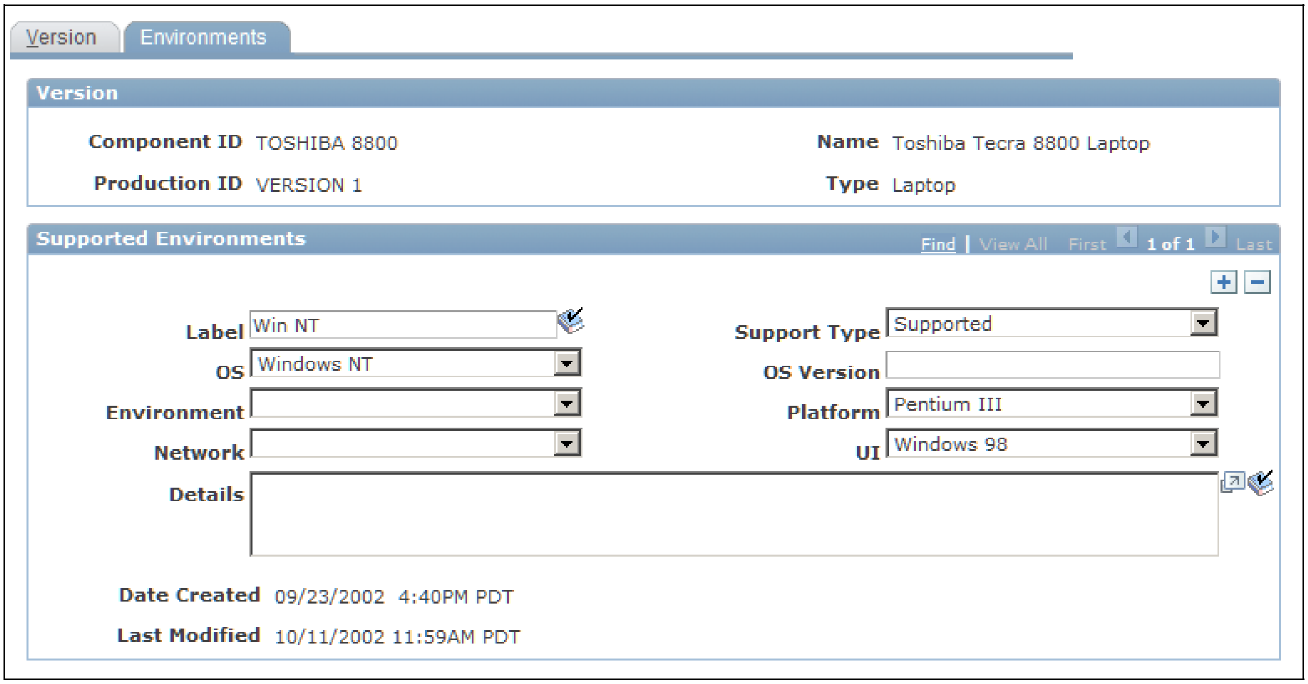
Responsible Parties

Generally, *responsible parties* are the team members charged with maintaining a product's quality and components. Responsible-party information entered here automatically transfers to the Defect page when the version is selected on that page.

Name	Select the names of responsible parties.
Type	Select the responsible party's role.

Defining Version Environments

Access the Environments page (Set Up CRM, Product Related, Quality Management, Component Versions, Environments).



Environments page

Component version environments relate only to software products and describe technical details needed to identify problems and fixes. Environment information entered here automatically transfers to the Defect page when the corresponding version is selected. This page is needed for software products only.

Label	Describe the component version environment.
Support Type	Select whether the software version has service support.
OS (operating system) and **OS Version** (operating system version)	Select the software operating system and version.
Environment, Platform, and **Network**	Select the database management system environment (for example, Microsoft SQL Server or Oracle), hardware platform, and network protocol within which the software operates.
UI (user interface)	Select the user interface that the software uses.

Chapter 8

Defining EIP Options for Integration to PeopleSoft or Oracle E-Business HRMS

This chapter provides an overview of the integration between PeopleSoft Customer Relationship Management (CRM) and the PeopleSoft or Oracle E-Business Human Resources Management System (HRMS). It discusses how to:

- Define Enterprise Integration Point (EIP) options.
- View human resources-related payroll information on the 360-Degree View page.

Note. The setup information on the Configure Role page determines the data that needs to be brought over from the PeopleSoft or E-Business HRMS.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up the 360-Degree View," Configuring Roles

Understanding the Integration Between PeopleSoft CRM and PeopleSoft or E-Business HRMS

This section discusses:

- Initial Data Load for integration with E-Business HRMS
- EIP message process.
- Request message.
- Response message.
- Inactive worker data.

Initial Data Load for Integration with E-Business HRMS

Part of the initial setup for CRM HelpDesk for Human Resources involves synchronizing certain data between the CRM and HRMS systems. When integrating with E-Business HRMS, data for department, job code, location, person, and workforce must be loaded from the E-Business system into flat files. This data is then loaded into the CRM system using batch processes to read each of the flat files.

EIP Message Process

All search information is stored in the PeopleSoft CRM database. When an agent accesses the 360-Degree View page for a specific employee, a secured synchronous request is sent to PeopleSoft or E-Business HRMS, depending on which system is the source of employee information.

When PeopleSoft or E-Business HRMS validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by a runtime synchronous request and response message. The structure of the request and response message differs depending on which HRMS is being accessed.

Each time an agent accesses an employee record from the 360-Degree View search page, the system triggers a runtime EIP. For security reasons, the information is not saved to the PeopleSoft CRM database.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Using the 360-Degree View."

Request Message

The system sends a secured synchronous request message from PeopleSoft CRM to the PeopleSoft or E-Business HRMS. The system validates the requestor's information before processing the request.

When integrating to PeopleSoft HRMS, the request message contains this information:

- Authentication cookie.

  A PeopleSoft-provided authentication token for the purpose of single sign on. PeopleSoft CRM transfers this cookie to PeopleSoft HRMS so that it can get a valid user. The system then uses the cookie to validate security access in PeopleSoft HRMS before it provides service.

- EmplID (employee ID) from the 360-Degree View search page.

- As of date.

  The date that is passed for effective-dated components in PeopleSoft HRMS. The default value is *%date* (today's date). The system can use this date to query information from past dates.

- Language.

  The language that the agent uses to log on to the application. The default value is *(%language).* PeopleSoft HRMS retrieves information based on the language code in the request for internationalization support.

When integrating to E-Business HRMS, the request message contains this information:

The request message header contains these fields:

- Responsibility Name.

  The value for this is defined on the Call Center page of the User Preferences.

- Responsibility Application Name.

  The value for this is defined on the Call Center page of the User Preferences.

- Security Group.

  The value for this is defined on the Call Center page of the User Preferences.

- Language.
- Organization ID.

  The value for this is defined on the Call Center page of the User Preferences.

The request message input parameters section includes these fields:

- EBS Person ID.

  Note. The EBS Person ID is not the same as the PeopleSoft Person ID.

- Effective Date.

The PeopleSoft system delivers these sections as options on the Define HCM Sections page. You can select or clear these options in the installation setup for your organization as a whole:

- Absence
- Benefits
- Direct Reports
- Job and Position Summary
- Pay Summary

Response Message

The synchronous response from PeopleSoft or E-Business HRMS contains a response to the information provided in the request. When integrating with PeopleSoft HRMS, the system displays all error messages provided by PeopleSoft HRMS (including the denial of access).

Note. You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft or E-Business HRMS as well as grant security access to the information and enable single sign on in PeopleSoft or E-Business HRMS. Depending on the setup in PeopleSoft or E-Business HRMS, a user ID may not have access to all of the information. In that case, the response returned from the Human Resource Management system will contain an error message, such as *Secured,* for certain information.

Inactive Worker Data

You can configure the system to bring inactive worker statuses into PeopleSoft CRM. The HR HelpDesk Worker 360–Degree View enables you to search for inactive workers. In addition to *Active* status, PeopleSoft HRMS has 11 worker statuses that you can select from on the Worker Statuses to EIP setup page. Options include *Deceased*, *Retired*, and *Leave of Absence*.

Note. When integrating with E-Business HRMS, all workers, regardless of status, are retrieved.

Loading Initial Data from E-Business HRMS

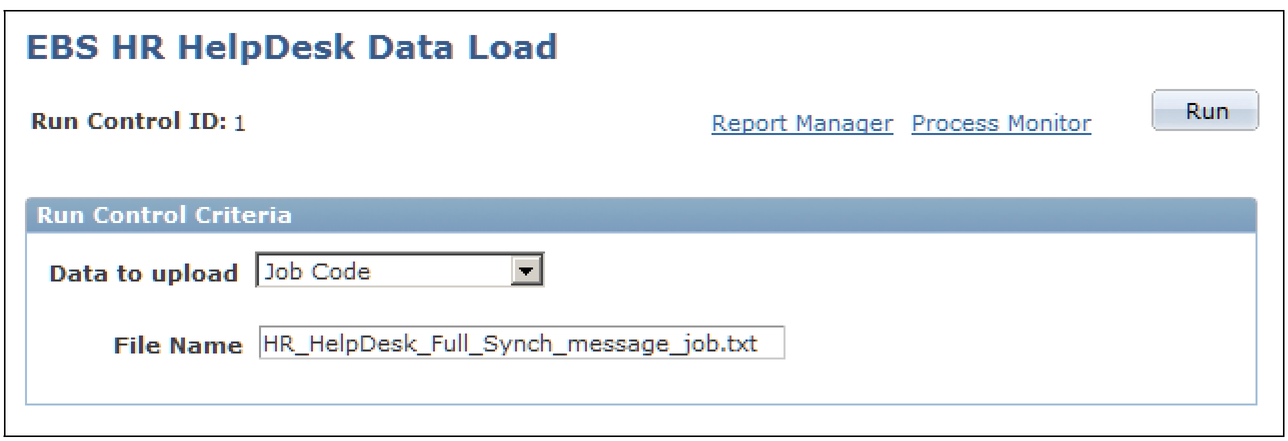
This section discusses how to load initial data from E-Business HRMS into the CRM system.

Pages Used to Load Initial Data from E-Business HRMS

Page Name	***Definition Name***	***Navigation***	***Usage***
EBS HR HelpDesk Data Load	RC_EBS_UPLOAD	Set Up CRM, Install, EBS Data Upload, EBS Data Upload	Load initial data from E-Business HRMS flat files.

Loading Initial Data from E-Business Flat Files

Access the EBS HR HelpDesk Data Load page (Set Up CRM, Install, EBS Data Upload, EBS Data Upload).



EBS HR HelpDesk Data Load page

Data to upload Select the type of data to be loaded from flat file to PeopleSoft CRM system.

File Name	Specify the name of the flat file containing data from the E-Business HRMS that is to be loaded into the PeopleSoft CRM system.
Run	Click this button to initiate the batch process that will load the data from the specified file.

Use this page to load data for department, job code, location, person, and workforce from the E-Business HR system. Each of the specified types of data must be loaded sequentially into the PeopleSoft CRM system. Note that the data to be loaded for each batch process must be specified in a flat file.

Note. For more information on the E-Business HRMS initial data load process, consult your PeopleSoft CRM Installation Guide.

Defining EIP Options

This section discusses how to:

- Activate and deactivate EIP subscription options.
- Make inactive worker statuses available in PeopleSoft CRM.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up the 360-Degree View"

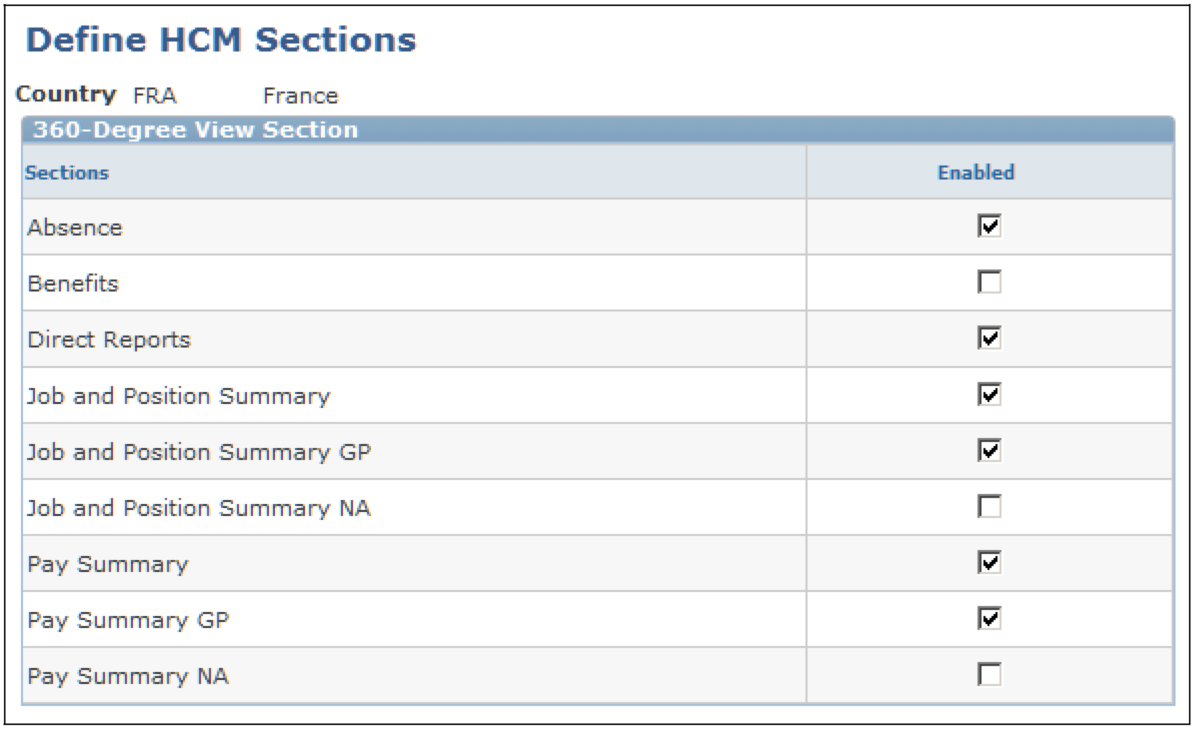
Pages Used to Define EIP Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Define HCM Sections	RB_TD_HCM_CNTRYSEC	Set Up CRM, Common Definitions, 360–Degree View, Define HCM Sections, Define HCM Sections	Activate and deactivate by country the subscription options that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources. **Note.** The previous options are overridden by the human resources options defined on the Configure Roles page.

Page Name	***Definition Name***	***Navigation***	***Usage***
Worker Statuses to EIP	RB_WRKR_EIP_OPN	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Worker Statuses, Worker Statuses	Make inactive worker statuses available in PeopleSoft CRM.

Activating and Deactivating EIP Subscription Options

Access the Define HCM Sections page (Set Up CRM, Common Definitions, 360–Degree View, Define HCM Sections, Define HCM Sections).



Define HCM Sections page

Select the check boxes associated with the sections that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources. You can define HCM sections for each country where you process payroll.

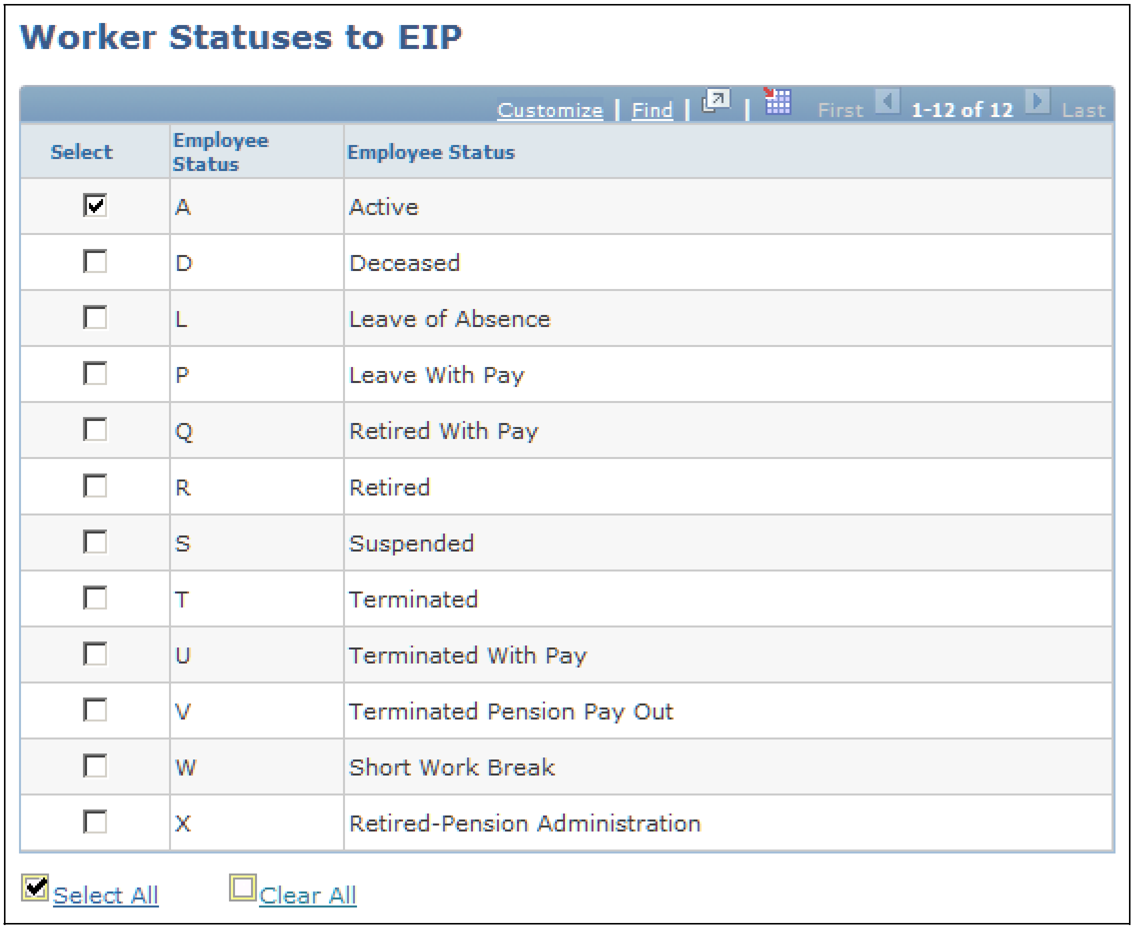
Note. *GP* stands for *Global Payroll*; *NA* stands for *North American Payroll.*

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Using the 360-Degree View"

Making Inactive Worker Statuses Available In PeopleSoft CRM

Access the Worker Statuses to EIP page (Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Worker Statuses, Worker Statuses).



Worker Statuses to EIP page

Use this page when integrating with PeopleSoft HCM to define by status which workers to bring into the CRM system. Select all of the check boxes associated with the worker statuses that you want to make available in PeopleSoft HelpDesk for Human Resources.

The system creates workers with the statuses that you selected. This information is available to agents on both the PeopleSoft HelpDesk for Human Resources Case search page and the PeopleSoft HelpDesk for Human Resources 360-Degree View page.

Viewing Human Resources-Related Payroll Information on the 360-Degree View Page

This section discusses how to:

- View the HR HelpDesk worker 360-Degree view.

- View the job and position summary.
- View the pay summary.
- View the payment total.
- View absences.
- View benefits.
- Viewing new action links and security roles.

Page Used to View Human Resources-Related Payroll Information on the 360-Degree View Page

Page Name	*Definition Name*	*Navigation*	*Usage*
360-Degree View	RB_TD_AGENT_VIEW	HRHD Worker 360-Degree View	View human resources data for workers (employees) that comes over to the CRM from the PeopleSoft or E-Business HRMS.

Viewing the HR HelpDesk Worker 360-Degree View

From the 360-Degree View page in PeopleSoft HelpDesk for Human Resources you can view fields and country-specific information for the Job and Position Summary, Pay Summary, and Benefits sections.

The PeopleSoft system also provides the ability to show the final paycheck for a terminated or retired employee on the 360–Degree View page.

Using Active Analytics Framework (AAF), functional users can create policies that identify and mark HelpDesk for Human Resources cases as secured when users save cases and the terms of the condition are met. To accomplish this, the system displays a Secured Case check box next to the Resolved by First Contact check box on the Configure Call Center Case Update Action policy page.

The 360-Degree View page also enables agents to distinguish between a person's paycheck and benefits as they relate to the person's assignments and relationship to the company. To enable help desk agents using the HelpDesk for Human Resources application to view IT help desk cases that are associated to assets for a given worker, the system displays a Help Desk Cases node on the HR HelpDesk Worker 360-Degree View page.

Fields in the Authorized Cases section on the 360-Degree View page are laid out to better reflect the importance of the fields to an agent. The system provides users with the ability to access a worker's historical, current, and future job record on the Worker component.

So that agents can only access the information that they have permission to view, PeopleSoft extended the 360 EIP to include row-level security. Rather than maintaining a second layer of security in the CRM setup pages, you only have to set up this security once. Using the Configure Roles page, you have the ability to make HR sections and subsections configurable in the HR HelpDesk Worker 360-Degree View page.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up the 360-Degree View"

Viewing Job and Position Summary

The Job and Position Summary section provides agents with a summary of the caller's job data to answer common questions about an employee's job title, location, or status.

This table describes some of the common fields that are shown in the Job and Position Summary section:

Common Fields	***Description***
As Of Date	Enables agents to see data for different dates. After a search, when the EIP is instantiated for the first time, the system passes the current date to the As Of Date field. All the data that appears is based on the current date. If the agent wants to see past-dated data, he or she can change the As Of Date field and click Go. This action re-instantiates the EIP.
Show Job Details for	The values in this drop-down list box come from the HD_360_XREF_WK record, which is included in the HD_360_RESPONSE_SYNC message. All the unique job codes from the response message are added to the Show Job Details for field. When more then one job code is available for the person, the system adds the *View All* value to the drop-down list box. Selecting the *View All* value displays all the data for the person in the Job and Position Summary, Pay Summary, and Benefits sections. The system hides the field if the person has only one job. Job and Position Summary, Pay Summary and Benefits are filtered when the agent selects any job code. All the records that take part in the filtering are tagged with the job code. This field only appears when integrating with PeopleSoft HCM.
Work Period	The time period during which the standard hours must be completed. This field only appears when integrating with PeopleSoft HCM.
Company	A high-level entity to which all departments roll up. This field appears here only when integrating with PeopleSoft HCM.

Common Fields	***Description***
Establishment	Organizational entities that define physical locations and specific attributes associated with the establishment. This field only appears when integrating with PeopleSoft HCM.
Labor Agreement	A field that is defined by customers and identify a specific labor contract. This field only appears when integrating with PeopleSoft HCM.
Employee Category	A class of employees as defined in the labor agreement.
Person Type	A blend of the Person Organization (PER_ORG) and Person of Interest Type (POI_TYPE) fields in PeopleSoft HCM. The Job and Position Summary section on the 360-Degree View page subscribes to the Person Organization and Person of Interest Type fields in the HelpDesk 360 Response Sync Message.

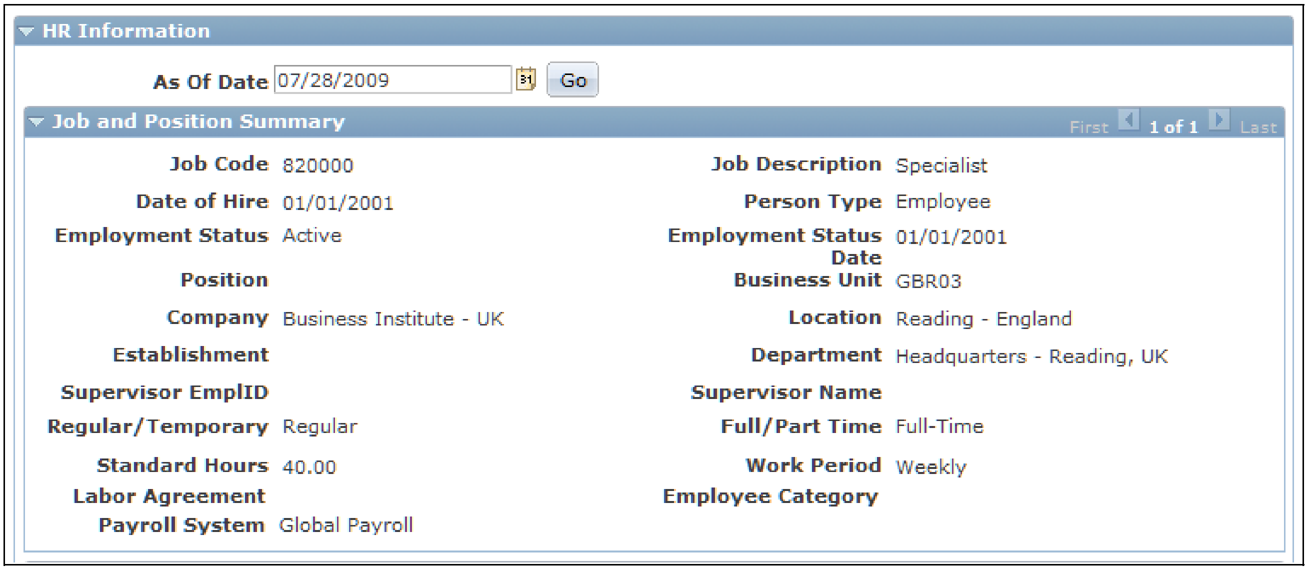
If appropriate, the system automatically hides fields that are not used outside of North America. Some available fields are commonly used only in France, such as Paid Hours and Paid Work Period.

Here is an example of the Job and Position Summary (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

Job and Position Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

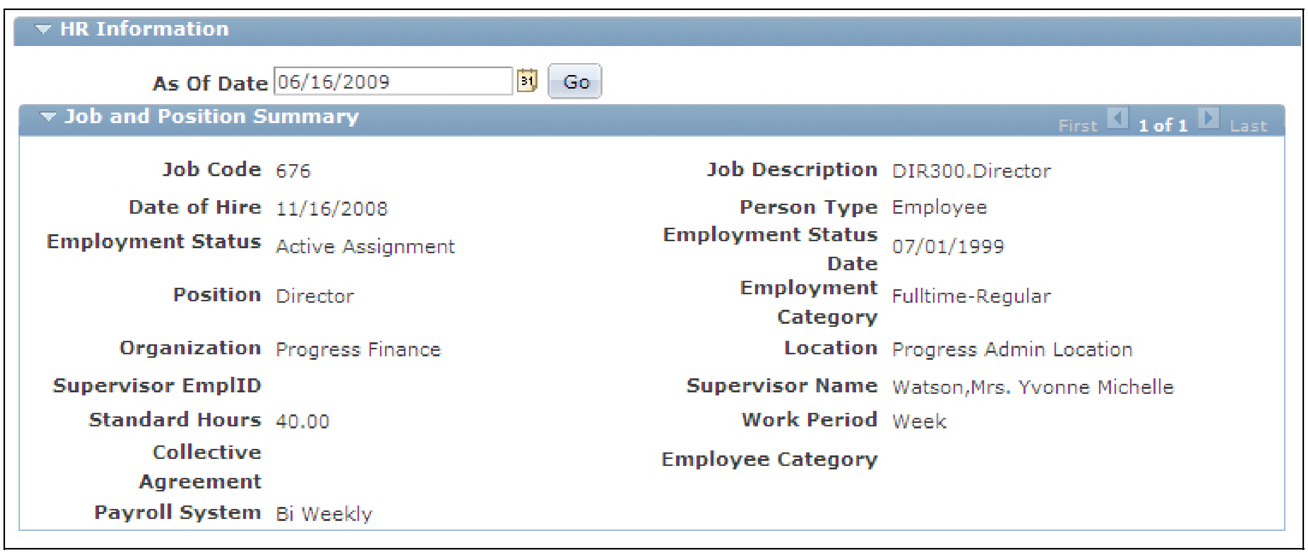
The Person Type field (Organizational Relationship) enables agents to distinguish among a contingent worker, employee, or person of interest (POI) in the Job and Position Summary section for each of a worker's jobs in the scroll area.

Here is an example of the Job and Position Summary (United Kingdom) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).



Job and Position Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Job and Position Summary section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to Oracle E-Business HRMS).



Job and Position Summary section - HRHD Worker 360-Degree View page (E-Business HRMS)

This table describes the fields used in the Job and Position Summary section:

Fields in the Job and Position Summary Section	***Description***
Common fields available when integrating to either PeopleSoft or E-Business HRMS	The system displays these fields for all workers: Job Code Job Description Date of Hire Person Type Employee Status Employment Status Date Position Location Supervisor ID Supervisor Name Standard Hours Work Period Employee Category Payroll System
Common fields available when integrating to PeopleSoft HRMS	The system displays these fields for all workers: Business Unit Company Establishment Department Regular/Temporary Full/Part Time Labor Agreement
Common fields available when integrating to E-Business HRMS	The system displays these fields for all workers: Employment Category Organization Collective Agreement
U.S. fields available when integrating to PeopleSoft HRMS	These fields appear if the worker's regulatory region is USA: FLSA Status FICA Status - Employee **Note.** The system hides the FLSA Status and FICA Status-Employee fields when the employee is Canadian.

Fields in the Job and Position Summary Section	***Description***
France fields available when integrating to PeopleSoft HRMS	These fields appear if the regulatory region is FRA: Paid Hours Paid Work Period

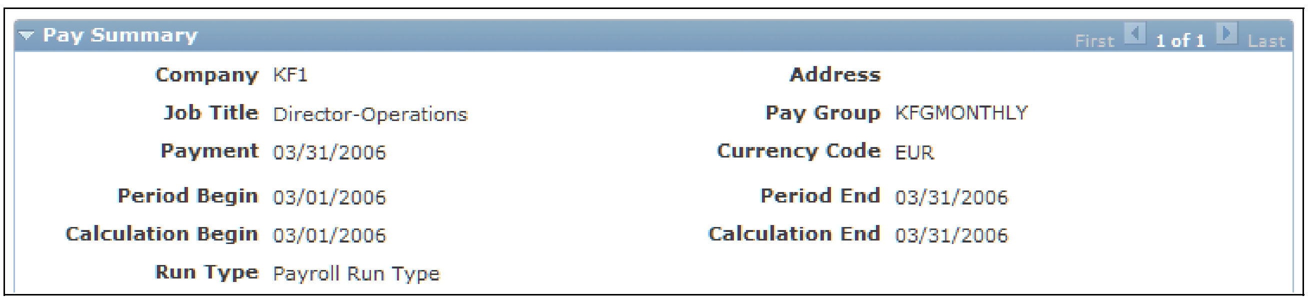
Viewing Pay Summary

The Pay Summary section provides an agent with a summary of an employee's last confirmed paycheck. The help desk agent uses the Pay Summary section to answer common questions about the caller's net pay, taxes, and withholding amounts.

When integrating with PeopleSoft HRMS, the system displays the Withholding Option section only for North American Payroll (U.S. and Canada) customers. This section includes the number of withholding allowances, special state tax information, additional percentages withheld, and additional amounts withheld at both the state and provincial and the federal levels.

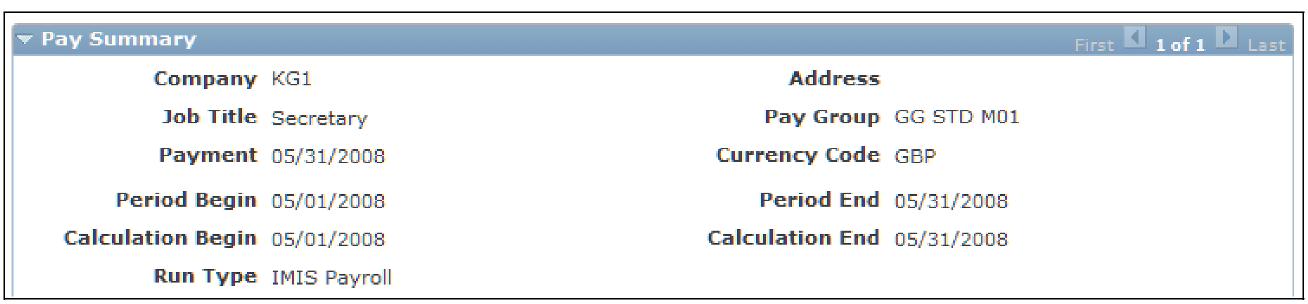
To enhance PeopleSoft Enterprise Global Payroll, new common fields as well as new fields for country extensions (U.K. and France) were added. PeopleSoft HRMS determines which global fields are sent in the 360 Response message.

Here is an example of the Pay Summary (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).



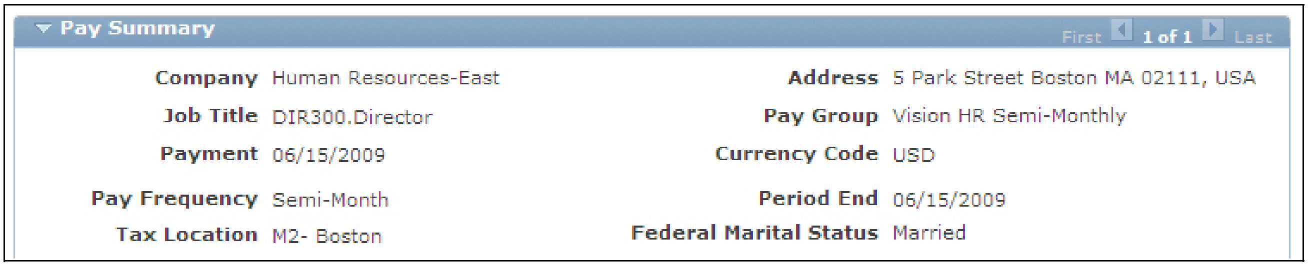
Pay Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Pay Summary (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).



Pay Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Pay Summary section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HRMS).



Pay Summary section - HRHD Worker 360-Degree View page (E-Business HRMS)

This table describes the fields that represent common fields versus country-specific fields in the Pay Summary section:

Fields in the Pay Summary Section	***Description***
Common fields when integrating to E-Business HRMS or for integrating to PeopleSoft HRMS Payroll North America and Global Payroll	These fields appear for all: Company Address * Paygroup Job Title Currency Code **Note.** * Even though Address is not a field commonly used by Global Payroll, it is included to make the common fields line up. It is coded to *Not Applicable* for Global Payroll.
Fields shown when integrating to E-Business HRMS or when integrating to PeopleSoft HRMS Payroll North America.	For PeopleSoft HRMS, these fields appear only when the employee's Pay System Flag is *PNA*: Period End * Tax Location Federal Marital Status Pay Frequency **Note.** * This field must appear for Global Payroll to align with the Period Begin Date field.

Fields in the Pay Summary Section	***Description***
Global Payroll-only fields	These fields appear when the employee's Pay System Flag is *GP*: Period Begin Period End Calculation Begin Calculation End Run Type **Note.** Calculation begin and end dates represent the first day and the last day of the period for which this payment was calculated. Run Type represents the type of payment (for example, regular pay, bonus, and so on).

Viewing Payment Total

The system also displays the Payment Total section as a subsection of the Pay Summary when the employee's pay summary flag equals Payroll North America (PNA) or Global Payroll (GP). For Global Payroll, the group box label is called Payment Total since *paycheck* is not a commonly used term in Europe.

Here is an example of the Payment Total (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).

Payment Total

Description	Current	Annual
Segment Taxable Net	1866.130000	5613.310000
Segment Gross Salary	2286.740000	6860.220000
Segment Payee's contributions	485.480000	1441.520000
Segment Employer's contributio	1208.687500	3603.702500
Urssaf ceiling A of the segmen	1294.500000	3883.500000

Payment Total section (France) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Payment Total (UK) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).

Note that Check Total for Payroll North America is relabeled to Payment Total for Global Payroll, and the rows that an agent may see vary based on how you configure your Global Payroll application.

Payment Total

Description	Current	Annual
Earnings	554.170000	1108.340000
Tax	110.800000	221.600000
National Insurance	11.130000	22.260000
Net Pay	432.240000	864.480000

Payment Total section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Payment Total section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HRMS).

Withholding Options

Type	Federal	MA
Withholding Allowances	2	1
Special State Tax Info		0
Additional Percent	0.000%	0.000%
Additional Amount	0.00	0.00
Override Tax Amount	0.00	0.00
Override Tax Percent	0.000%	0.000%

Payment Total

Type	Current	YTD
Total Earnings	6469.31	150805.02
Taxable Gross	6296.53	147694.98
Total Taxes	1251.34	33796.09
Total Deductions	176.93	3184.74
Net Pay	5009.22	113251.43

Payment Total section - HRHD Worker 360-Degree View page (E-Business HRMS)

This table describes the fields used in the Payment Total section:

Fields in the Payment Total Section	***Description***
Description (PeopleSoft HRMS) or Type (E-Business HRMS) column.	For PeopleSoft HRMS, this data appears under the Descriptioncolumn only when the employee's Pay System Flag is *PNA*: Total Earnings Taxable Gross Total Taxes Total Deductions Net Pay ********* For PeopleSoft HRMS, depending on the country, this data appears under the Description column only when the employee's Pay System Flag is *GP*: Segment Taxable Net (France) Yearly Gross Salary (France) National Insurance (France) Segment Payee's contribution (France) Segment Employer's contribution (France) Urssaf ceiling A of the segment (France) Earnings (UK) Tax (UK) National Insurance (UK) Net Pay (UK)
Current column.	Displays the current amount for the field on the corresponding line under the Description or Type column in the grid.
Annual (PeopleSoft HRMS) or YTD (E-Business HRMS) column	Displays the annual amount for the field on the corresponding line under the Description or Type column in the grid.

Viewing Absences

With the introduction of Global Payroll to the 360-Degree View, it is common for employees to call the help desk with questions about absence accruals and balances. European countries track more absence types than the U.S. typically tracks.

Furthermore, customers need the ability to tailor the absence section to meet their individual country's needs. PeopleSoft HRMS offers absence management as a separate product; therefore, the Absence section is a separate section in the 360-Degree View page, and it has no ties to the Pay Summary section.

Here is an example of the Absence (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).

Absence

Description	Entitlement Balance	As of Date
SSP Absence	25.00	03/31/2006

Absence section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Absence (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).

Absence

Description	Entitlement Balance	As of Date
Paid Vacation Days balance	25.00	03/31/2006
Paid Vacation Days entitlement	25.00	03/31/2006

Absence section (France) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Absence section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HRMS).

Absence

Description	Entitlement Balance	As of Date
Vacation PTO	12.00	06/15/2009
Sick Leave	12.00	06/15/2009

Absence section - HRHD Worker 360-Degree View page (E-Business HRMS)

Requirements for Absence

Using the 360–Degree View configuration, you can enable or disable the Absence section on the 360–Degree View page. When integrating to PeopleSoft HRMS, the 360–Degree View page can display the Absence section with or without payroll data for both Payroll North America and Global Payroll.

The absence configuration defined in PeopleSoft HRMS determines how columns are labeled in the Absence grid. You can, however, configure the section name as the terminology varies from country to country (for example, *Absence*,*Leave*, and so on).

The 360-Degree View page subscribes to and displays the following fields:

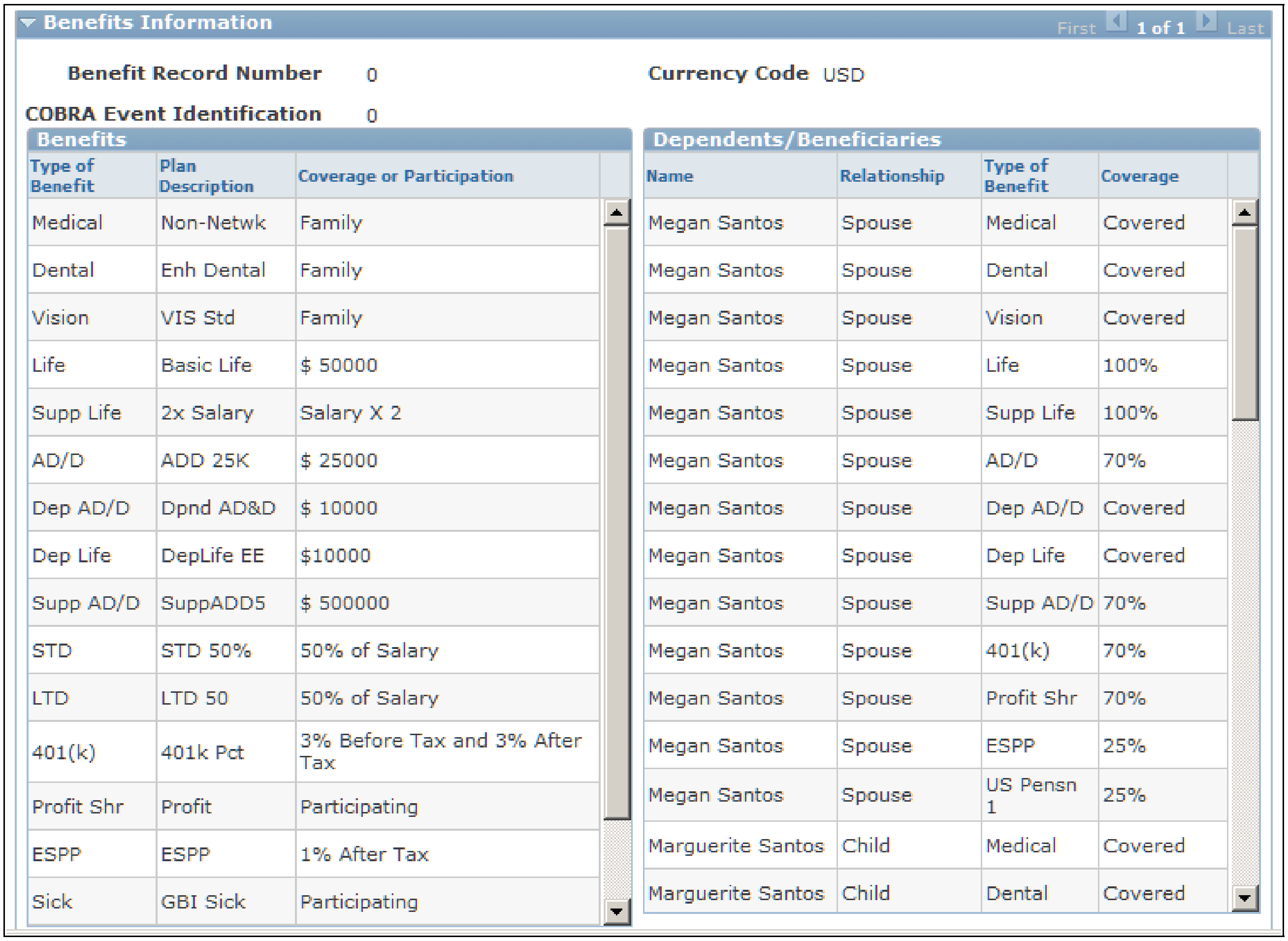
Field	***Description***
Description	The description of the absence type (for example, PTO, sick, vacation, and so on).
Entitlement Balance	The grand total, positive or negative, accrued by the worker for the absence type.

Field	***Description***
As of Date	The date as of which the entitlement balance was last calculated.

Viewing Benefits

The Benefits Information section provides the help desk agent with a summary of the caller's benefits to help them answer common questions about health plans, level of coverage, contributions to a savings plan, and coverage for dependents and beneficiaries.

Here is an example of the Benefits section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).



Type of Benefit	Plan Description	Coverage or Participation
Medical	Non-Netwk	Family
Dental	Enh Dental	Family
Vision	VIS Std	Family
Life	Basic Life	$ 50000
Supp Life	2x Salary	Salary X 2
AD/D	ADD 25K	$ 25000
Dep AD/D	Dpnd AD&D	$ 10000
Dep Life	DepLife EE	$10000
Supp AD/D	SuppADD5	$ 500000
STD	STD 50%	50% of Salary
LTD	LTD 50	50% of Salary
401(k)	401k Pct	3% Before Tax and 3% After Tax
Profit Shr	Profit	Participating
ESPP	ESPP	1% After Tax
Sick	GBI Sick	Participating

Name	Relationship	Type of Benefit	Coverage
Megan Santos	Spouse	Medical	Covered
Megan Santos	Spouse	Dental	Covered
Megan Santos	Spouse	Vision	Covered
Megan Santos	Spouse	Life	100%
Megan Santos	Spouse	Supp Life	100%
Megan Santos	Spouse	AD/D	70%
Megan Santos	Spouse	Dep AD/D	Covered
Megan Santos	Spouse	Dep Life	Covered
Megan Santos	Spouse	Supp AD/D	70%
Megan Santos	Spouse	401(k)	70%
Megan Santos	Spouse	Profit Shr	70%
Megan Santos	Spouse	ESPP	25%
Megan Santos	Spouse	US Pensn 1	25%
Marguerite Santos	Child	Medical	Covered
Marguerite Santos	Child	Dental	Covered

Benefits section - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Here is an example of the Benefits section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HRMS).

Benefits Information First 1 of 1 Last

Benefit Record Number 0

Benefits

Type of Benefit	Plan Description	Coverage or Participation
Medical	Aetna (PPO)	EE & Family
Dental	Comprehensive Dental Plan	EE & Family
Vision	Vision Plan 1	EE & Family
Life	AD & D	3 X Compensation
Life	Life	3 X Compensation
Life	Spousal Life	Decline Coverage
Life	Dependent Life	$10,000
Life	Business Travel Accident Insur	$50,000
Disability	Long Term Disability	66 2/3% of Annual Compensation

Dependents/Beneficiaries

Name	Relationship	Type of Benefit	Coverage
James,Stephanie	Spouse	Medical	COVERED
James,Stephanie	Spouse	Dental	COVERED
James,Stephanie	Spouse	Vision	COVERED
James,Robert Jr.	Child	Medical	COVERED
James,Robert Jr.	Child	Dental	COVERED
James,Robert Jr.	Child	Vision	COVERED
James,Stephanie	Spouse	Life	100
James,Stephanie	Spouse	Business Travel Accident Insur	100

Benefits section - HRHD Worker 360-Degree View page (E-Business HRMS)

The Benefits grid contains information regarding the individual's coverage. The Dependents/Beneficiaries grid contains information regarding the coverage for the individual's dependents and beneficiaries.

This information comes from E-Business HRMS or from the PeopleSoft HRMS Base Benefits module. When using PeopleSoft HRMS, data is available to support the U.K. and France. The U.K. currently uses the Base Benefits module to manage benefit enrollment for employees.

Direct Reports

Here is an example of the Direct Reports section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HRMS).

Direct Reports

Name	Employee ID	Location	Employment Status		Add Case
Chen,Mrs. Micheal	1535	Boston Mfg Plant 2 used in Ope	Active Assignment	360	Add Case
McAllister,Mr. Lindsay	1560	Boston Mfg Plant 2 used in Ope	Active Assignment	360	Add Case
Gootee,Mr. Satish	1549	Boston Mfg Plant 2 used in Ope	Term w/Pay	360	Add Case

Direct Reports sections - HRHD Worker 360-Degree View page (E-Business HRMS)

United Kingdom Requirements

For UK customers, the system displays Company Car in the Benefits sections. The system displays the attributes of the car, such as make and model, if the attributes are included in the 360 Sync Response message.

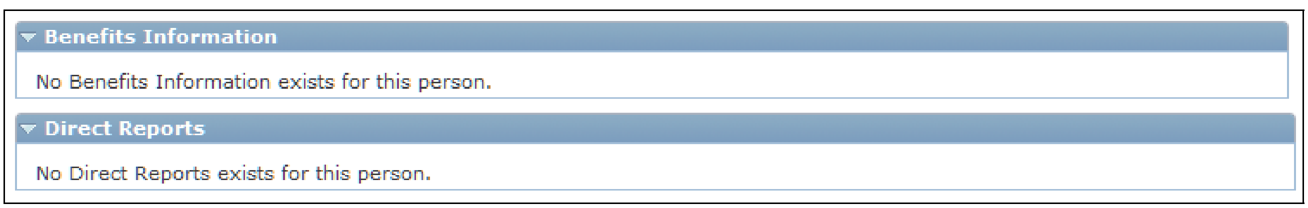
Here is an example of the Benefits and Direct Reports (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).

Benefits Information and Direct Reports sections (United Kingdom) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Requirements for France

Since France does not use Base Benefits to manage employee benefits enrollments, the system does not display information in the Benefits Information section. Instead, it displays this message: *No Benefits Information exists for this person.*

Here is an example of the Benefits and Direct Reports (France.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HRMS).



Benefits Information and Direct Reports sections (France) - HRHD Worker 360-Degree View page (PeopleSoft HRMS)

Viewing New Action Links and Security Roles

Agents use action links when the information on the Worker 360-Degree View page is insufficient to answer the caller's questions. The agent can create a case for the caller and transfer to the pages in PeopleSoft or E-Business HRMS directly from the case to find additional HR-related information.

With the introduction of Global Payroll, PeopleSoft CRM added new action links to the interface with PeopleSoft HRMS versions 8.9 and above. This table lists the action links associated with PeopleSoft Global Payroll information:

Action Link Category	***Link***
Benefits	Car Allocation Car Plan
Human Resources	Update Contract
Global Payroll - France	Payslip — FRA Request Loans — FRA Garnishments —FRA
Global Payroll - UK	Payslip — GBR Review Loans — GBR Maintain Loans — GBR Absence Event — GBR
Global Payroll - Core	Bank Account Net Pay Elections Absence Event

The system displays the action links on the Case page based on the agent's security access. If the agent doesn't have access, the system does not display the link in the action category drop-down list box.

Chapter 9

Defining Options for Integration to PeopleSoft Campus Solutions

This chapter provides an overview of the integration between PeopleSoft Customer Relationship Management (PeopleSoft CRM) and PeopleSoft Campus Solutions (CS). It discusses how to:

- Define Enterprise Integration Point (EIP) options.
- View higher education-related information on the 360-Degree View page.

Note. The setup information on the Configure Role page determines the data that needs to be brought over from PeopleSoft Campus Solutions.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up the 360-Degree View," Configuring Roles

Understanding the Integration Between PeopleSoft CRM and PeopleSoft Campus Solutions

This section discusses:

- EIP message process.
- Request message.
- Response message.

EIP Message Process

All search information is stored in the PeopleSoft CRM database. When an agent accesses the 360-Degree View page for a specific constituent, a secured synchronous request is sent to PeopleSoft CS.

When PeopleSoft CS validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by the SCC_CONSTITUENT Integration Broker service and its associated synchronous service operation and request and response messages.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Using the 360-Degree View."

Request Message

The system sends a secured sync request message from PeopleSoft CRM to PeopleSoft CS. The system validates the requestor's information before processing the request.

The request message contains this information:

- EmplID (employee ID) from the 360-Degree View search page.
- Checklist, Communications, and Comments (3C) option (to indicate if data for this section is being requested).
- Admissions option (to indicate if data for this section is being requested).
- Transfer Credits option (to indicate if data for this section is being requested).
- Academics option (to indicate if data for this section is being requested).
- Finances option (to indicate if data for this section is being requested).
- Financial Aid option (to indicate if data for this section is being requested).
- Transcript option (to indicate if data for this section is being requested).
- Contributor Relations option (to indicate if data for this section is being requested).
- Affiliations option (to indicate if data for this section is being requested).
- Language Code.

  The language that the agent uses to log on to the application. The default value is *(%language).* PeopleSoft Campus Solutions retrieves information based on the language code in the request for internationalization support.

Response Message

The sync response from PeopleSoft CS contains a response to the information provided in the request.

The response contains multiple rowsets that provide data for the summary (profile) section of the 360-degree view page and for all of the requested sections that are specific to the 360-Degree View for Higher Education (Checklist, Communications, and Comments; Admissions; Transfer Credits; Academics; Finances; Financial Aid; Transcript; Contributor Relations; and Affiliations).

Note. You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft CS as well as grant security access to the information and enable single sign on in PeopleSoft CS. Depending on the setup in PeopleSoft CS, a user ID may not have access to all of the information.

When all data for a particular 360-degree view section originates from the same component in PeopleSoft CS and the user does not have security access to the component, the word *Secured* is displayed instead of showing the details for that section. However, if data for the section originates from different components and the user has access to some but not all of those components, all details in the section are displayed but the fields for which the user has no security will appear blank

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Viewing Campus Solutions-Related Information on the 360-Degree View Page

This section discusses how to:

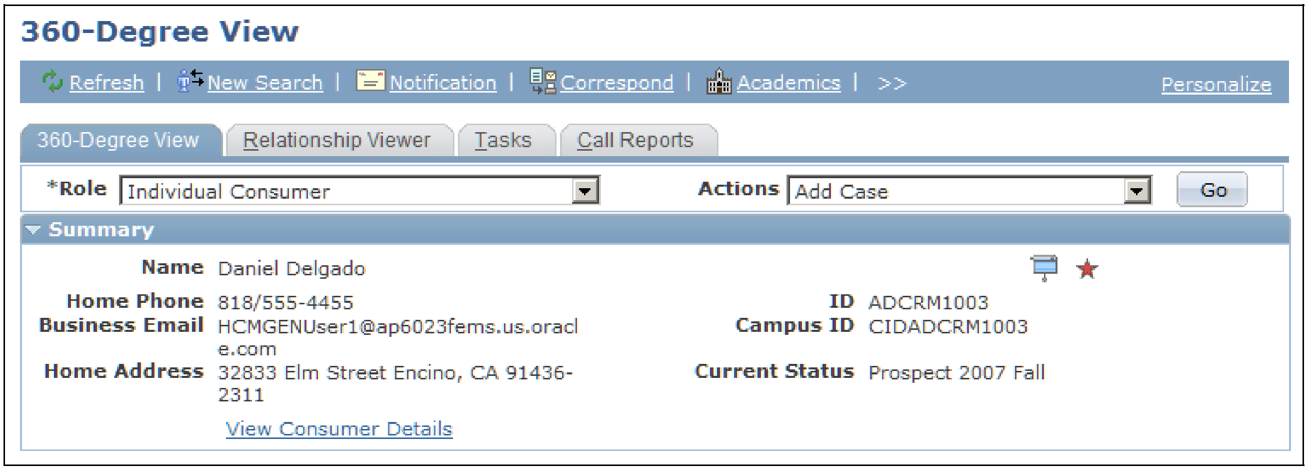
- View the Constituent 360-Degree view page (for HR HelpDesk for Higher Education).
- View the checklist, communications, and comments section.
- View recruiting information.
- View admissions information.
- View information for the credit transfer.
- View academics information.
- View finances information.
- View financial aid information.
- View transcript information.
- View affiliations information.
- View information on contributor relations.

Page Used to View Campus Solutions-Related Information on the 360-Degree View Page

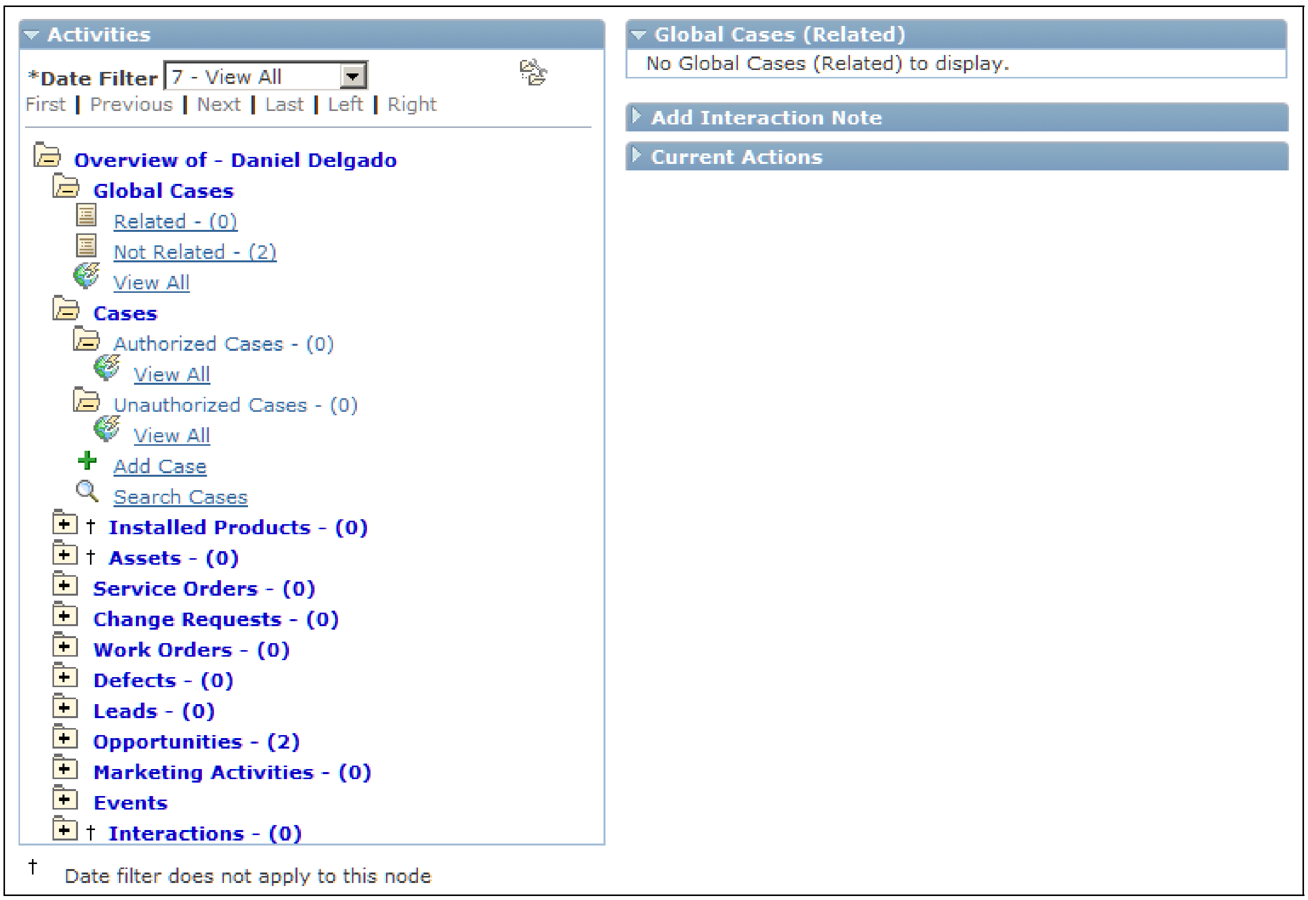
Page Name	***Definition Name***	***Navigation***	***Usage***
360-Degree View	RB_TD_AGENT_VIEW	Constituent 360-Degree View	View academic-related data for a constituent that comes over to PeopleSoft CRM from PeopleSoft Campus Solutions.

Viewing the Constituent 360-Degree View

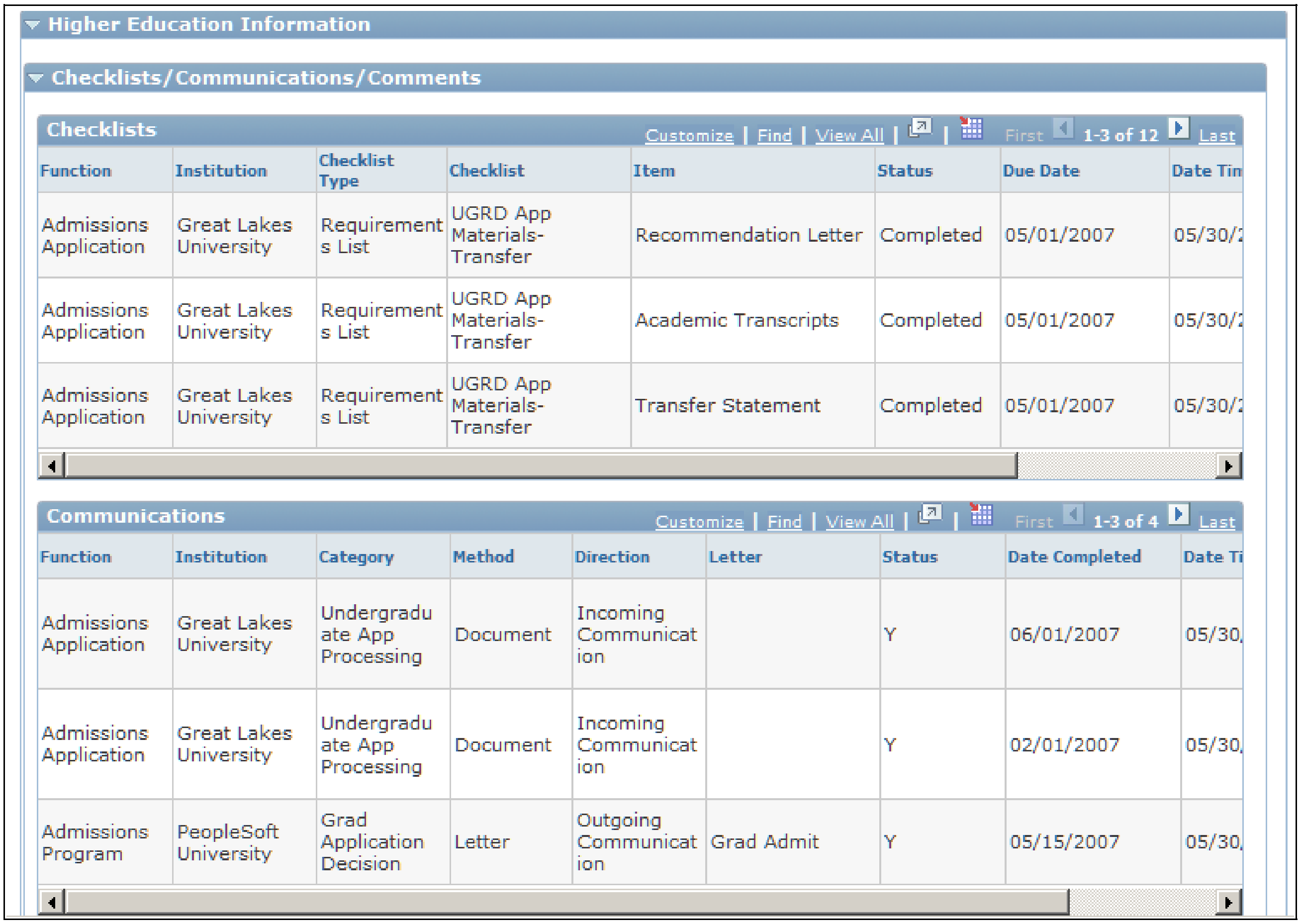
Access the Constituent 360-Degree View page (Constituent 360-Degree View)



Constituent 360-Degree View page (1 of 7)



Constituent 360-Degree View page (2 of 7)



Higher Education Information

Checklists/Communications/Comments

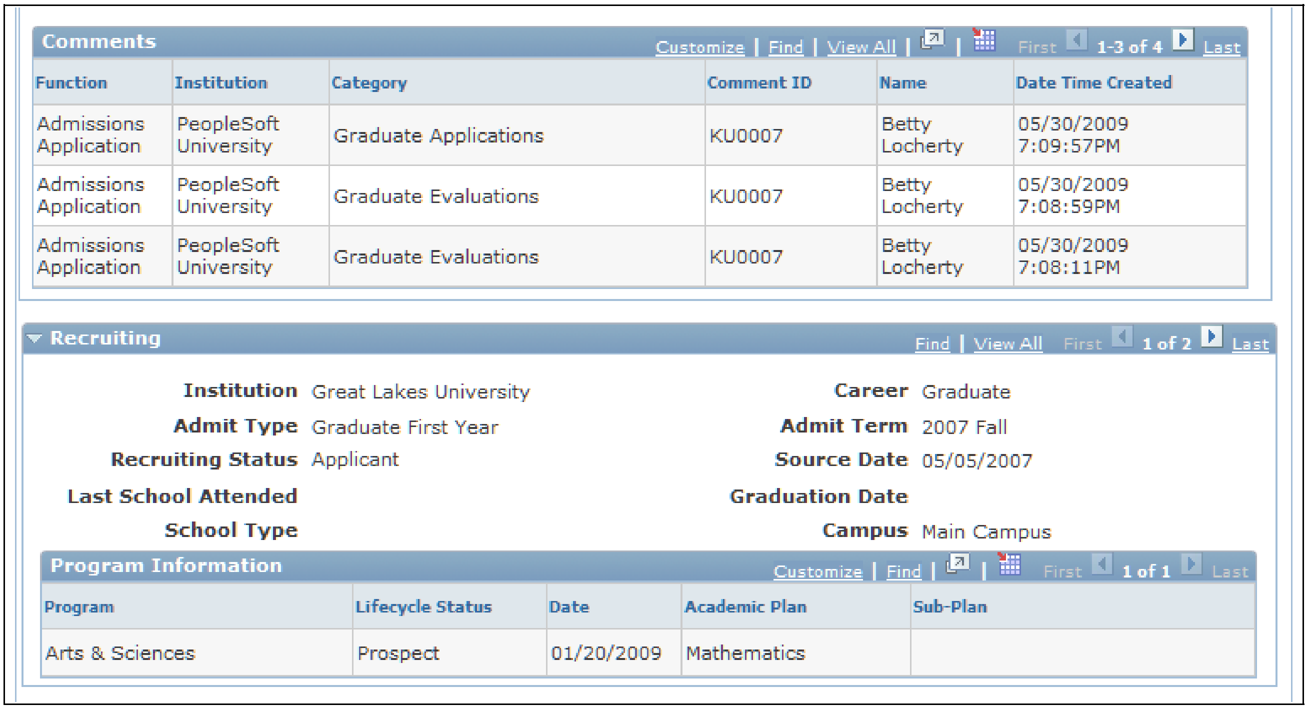
Checklists — Customize | Find | View All | First 1-3 of 12 Last

Function	Institution	Checklist Type	Checklist	Item	Status	Due Date	Date Tin
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Recommendation Letter	Completed	05/01/2007	05/30/2
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Academic Transcripts	Completed	05/01/2007	05/30/2
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Transfer Statement	Completed	05/01/2007	05/30/2

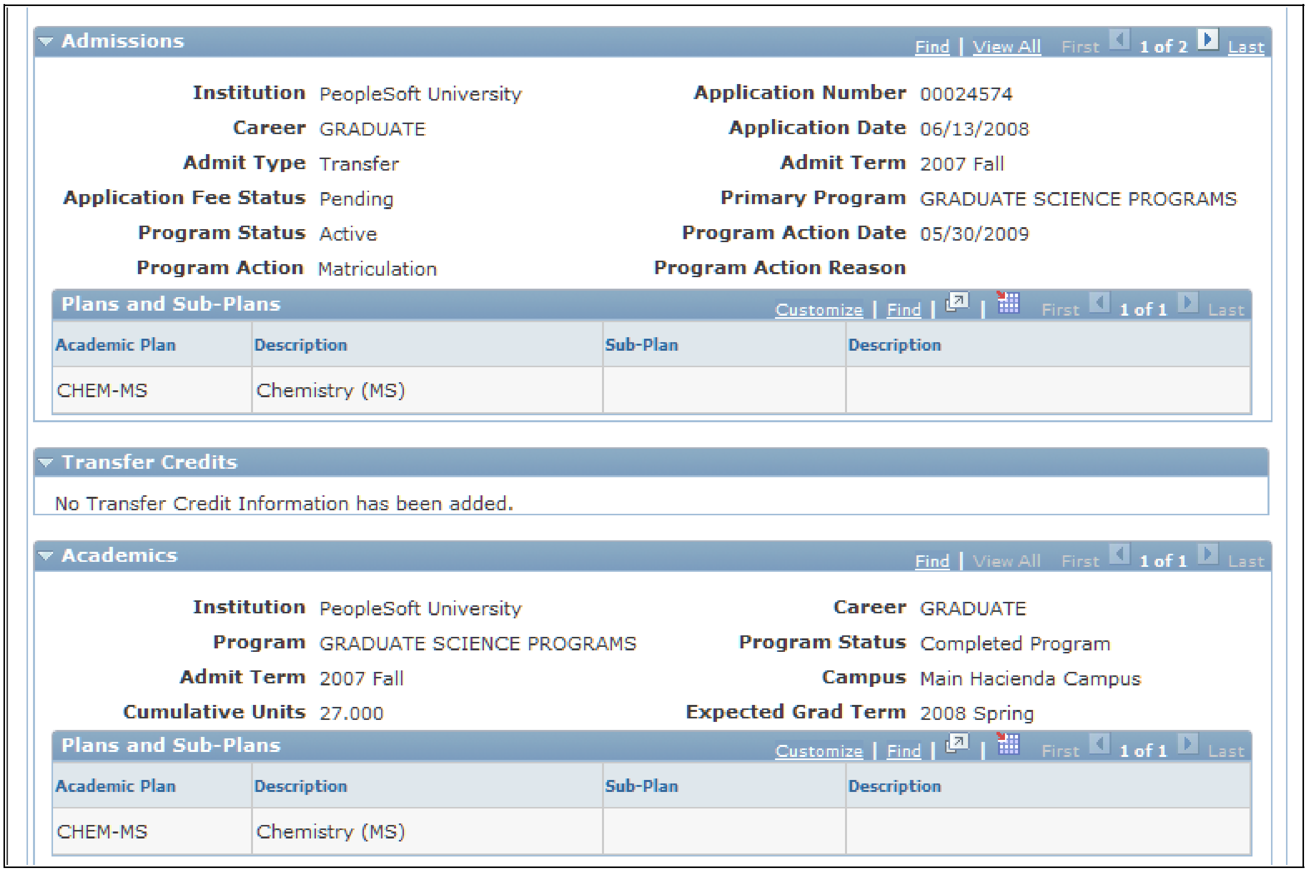
Communications — Customize | Find | View All | First 1-3 of 4 Last

Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Ti
Admissions Application	Great Lakes University	Undergraduate App Processing	Document	Incoming Communication		Y	06/01/2007	05/30,
Admissions Application	Great Lakes University	Undergraduate App Processing	Document	Incoming Communication		Y	02/01/2007	05/30,
Admissions Program	PeopleSoft University	Grad Application Decision	Letter	Outgoing Communication	Grad Admit	Y	05/15/2007	05/30,

Constituent 360-Degree View page (3 of 7)



Constituent 360-Degree View page (4 of 7)



Admissions Find | View All First 1 of 2 Last

Institution	PeopleSoft University	**Application Number**	00024574
Career	GRADUATE	**Application Date**	06/13/2008
Admit Type	Transfer	**Admit Term**	2007 Fall
Application Fee Status	Pending	**Primary Program**	GRADUATE SCIENCE PROGRAMS
Program Status	Active	**Program Action Date**	05/30/2009
Program Action	Matriculation	**Program Action Reason**	

Plans and Sub-Plans Customize | Find | First 1 of 1 Last

Academic Plan	Description	Sub-Plan	Description
CHEM-MS	Chemistry (MS)		

Transfer Credits

No Transfer Credit Information has been added.

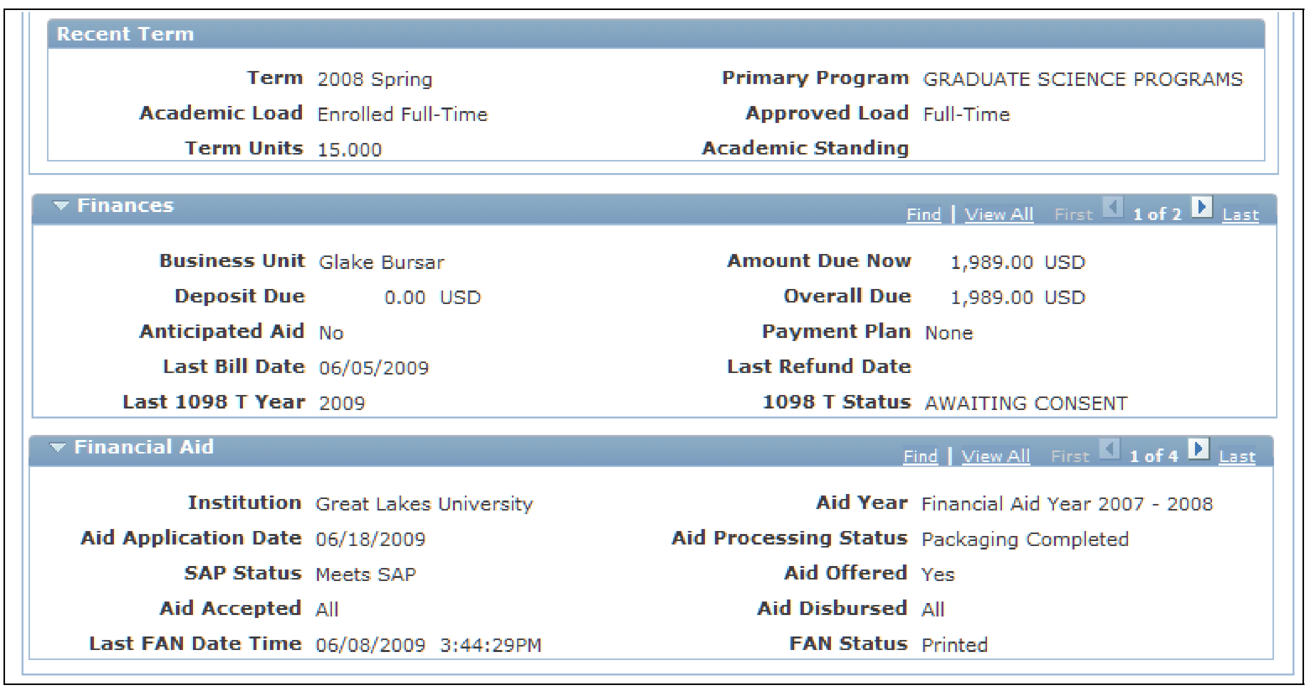
Academics Find | View All First 1 of 1 Last

Institution	PeopleSoft University	**Career**	GRADUATE
Program	GRADUATE SCIENCE PROGRAMS	**Program Status**	Completed Program
Admit Term	2007 Fall	**Campus**	Main Hacienda Campus
Cumulative Units	27.000	**Expected Grad Term**	2008 Spring

Plans and Sub-Plans Customize | Find | First 1 of 1 Last

Academic Plan	Description	Sub-Plan	Description
CHEM-MS	Chemistry (MS)		

Constituent 360-Degree View page (5 of 7)



Recent Term

Term	2008 Spring	**Primary Program**	GRADUATE SCIENCE PROGRAMS
Academic Load	Enrolled Full-Time	**Approved Load**	Full-Time
Term Units	15.000	**Academic Standing**	

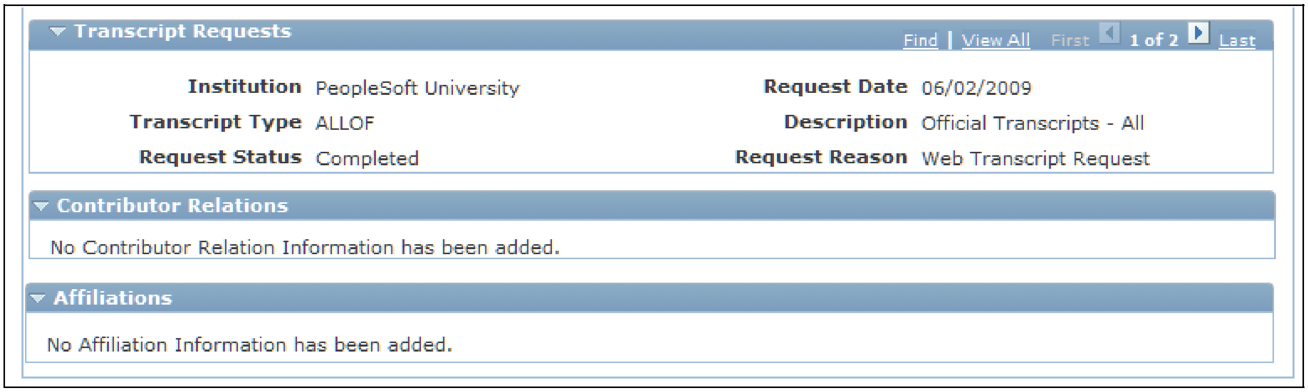
Finances Find | View All First 1 of 2 Last

Business Unit	Glake Bursar	**Amount Due Now**	1,989.00 USD
Deposit Due	0.00 USD	**Overall Due**	1,989.00 USD
Anticipated Aid	No	**Payment Plan**	None
Last Bill Date	06/05/2009	**Last Refund Date**	
Last 1098 T Year	2009	**1098 T Status**	AWAITING CONSENT

Financial Aid Find | View All First 1 of 4 Last

Institution	Great Lakes University	**Aid Year**	Financial Aid Year 2007 - 2008
Aid Application Date	06/18/2009	**Aid Processing Status**	Packaging Completed
SAP Status	Meets SAP	**Aid Offered**	Yes
Aid Accepted	All	**Aid Disbursed**	All
Last FAN Date Time	06/08/2009 3:44:29PM	**FAN Status**	Printed

Constituent 360-Degree View page (6 of 7)



Constituent 360-Degree View page (7 of 7)

From the 360-Degree View page in PeopleSoft Service Center for Higher Education you can view fields for the sections on Checklist, Communications, and Comments; Recruiting; Admissions; Transfer Credits; Academics; Finances; Financial Aid; Transcript; Contributor Relations; and Affiliations.

So that agents can only access the information that they have permission to view, the 360 EIP includes row-level security. Rather than maintaining a second layer of security in the CRM setup pages, you only have to set up this security once. Using the Configure Roles page, you have the ability to configure which Campus Solutions sections are available for a user with that role who accesses the Constituent 360-Degree View page.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up the 360-Degree View"

Viewing Checklists, Communications, and Comments

This section includes data from the checklists, communications, and comments associated with the constituent to help provide agents with helpful information as they work on that person's request or issue.

Checklists, communications, and comments provide a way to track and analyze correspondence, lists of requirements, and notes about constituents.

- Checklists are used to assign lists of requirements to individuals, organizations, events, or groups of individuals and to monitor constituent's progress toward completing those requirements.
- Communications enable users to track and analyze all of the institution's contacts with students, staff, constituents, and organizations inside and outside the institution. Note that the Constituent 360-Degree View only displays communications to and from constituents.
- Comments enable users to track remarks, explanations, or clarifications about individuals and organizations. Note that the Constituent 360-Degree View only displays comments regarding constituents.

Here is an example of the Checklist, Communications, and Comments section from the Service Center for Higher Education Constituent 360-Degree View page.

Checklists/Communications/Comments

Checklists Customize | Find | View All | First 1-3 of 6 Last

Function	Institution	Checklist Type	Checklist	Item	Status	Due Date	Date Time
Admissions Program	PeopleSoft University	Requirements List	UG Appl Requirements - All	ACT or SAT I Test Scores	Initiated	04/01/2008	05/29/20
Admissions Program	PeopleSoft University	Requirements List	UG Appl Requirements - All	Personal Statement	Initiated	04/01/2008	05/29/20
Admissions Program	PeopleSoft University	Requirements List	UG Appl Requirements - All	Academic Transcripts	Initiated	04/01/2008	05/29/20

Communications Customize | Find | View All | First 1-3 of 3 Last

Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Ti
Admissions Application	PeopleSoft University	Undergrad Appl Processing	Letter	Outgoing Communication	Frosh Application Acknlgment	Y	03/17/2008	05/29/
Event	PeopleSoft University	Undergrad Post-Appl Event	Letter	Outgoing Communication	Fall Event Invitation	Y	06/11/2007	05/29/
Admissions Program	PeopleSoft University	Undergrad Appl Decision	Letter	Outgoing Communication		N		05/29/

Comments Customize | Find | View All | First 1-2 of 2 Last

Function	Institution	Category	Comment ID	Name	Date Time Created
Admissions Application	PeopleSoft University	Undergrad Admission - Secure	KU0007	Betty Locherty	05/29/2009 5:10:02PM
Admissions Program	PeopleSoft University	Undergraduate Evaluations	KU0007	Betty Locherty	05/29/2009 5:08:33PM

Checklist, Communications, and Comments section of 360-Degree View for Higher Education page

Checklists

Field	***Description***
Function	The code for the functional area with which the constituent is associated, for example *Admissions.*
Institution	Institution that applies to the specific Checklist.
Checklist Type	Type that best describes the checklist
Checklist	The code that describes the checklist assigned to an individual, organization, or event.
Item	Items available for specific checklists.

Field	***Description***
Status	The Checklist Status.
Due Date	The date by which the checklist must be completed for the constituent.
DateTime	Date and time when checklist was created.

Communications

Field	***Description***
Function	The code for the functional area with which the constituent is associated.
Institution	Institution associated with this communication.
Category	The category of communication context to indicate why a communication was sent or received
Method	Indicates the form of a communication (for example, letter, email, or phone call).
Direction	The direction of a communication, such as in person, incoming communication, or outgoing communication.
Letter	The letter code for a communication. The code specifies the variable data associated with this communication.
Status	The communication status. Valid values are *Completed* or *Not Completed.*
Date Completed	Date when the communication was completed.
Communication Date	Date the communication was created.

Comments

Field	***Description***
Function	The code for the functional area with which this constituent is associated.
Institution	Institution associated with this comment.
Category	The business need with which this comment is associated.
Comment ID	ID of the person entering the comment

Field	***Description***
Name	The name of the person entering the comment.
DateTime	Date and time when the comment was created.

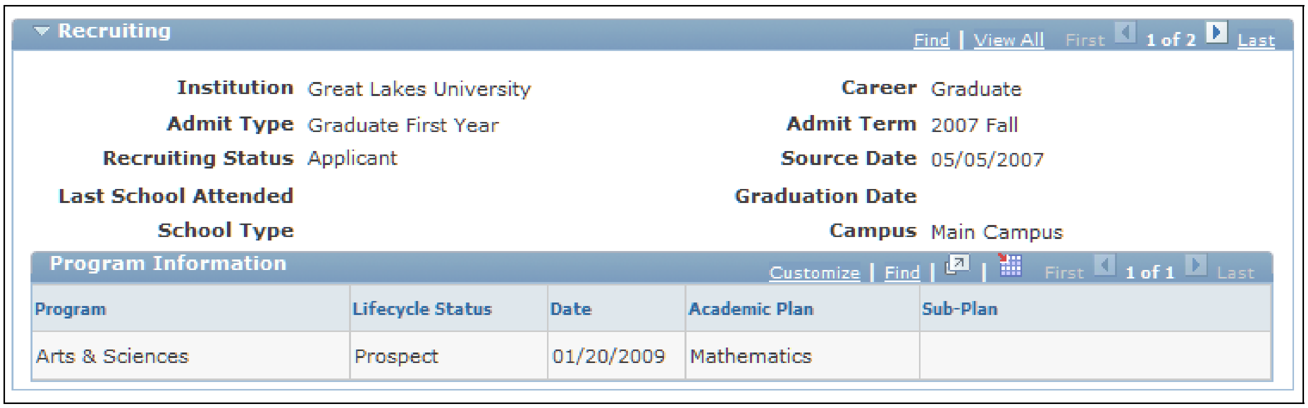
Viewing Recruiting Information

This section provides a summary of a suspect's or prospect's academic interest.

The information in this section is stored in and retrieved from the PeopleSoft CRM system: it is not part of the EIP message to PeopleSoft Campus Solutions.

When there is no program information for a given institution and career, academic information is retrieved for data where the recruiting status is *Suspect,Prospect,* or *Applicant.*

When there is program information for a given institution and career, academic information is displayed for any program where the constituent's lifecycle status is *Suspect,Prospect,* or *Applicant.*



Recruiting section of 360-Degree View for Higher Education page

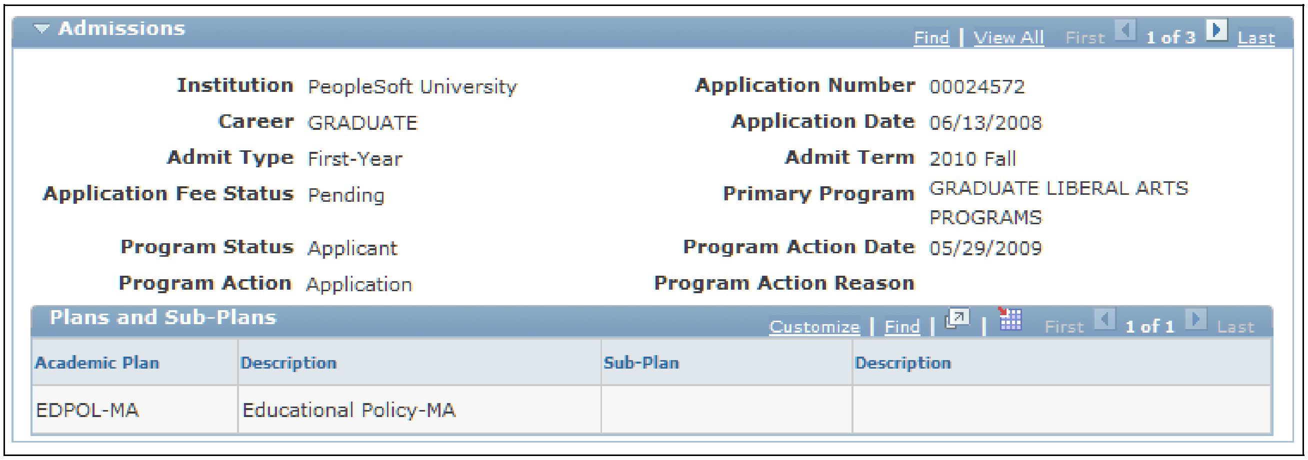
Field	***Description***
Institution	Institution that is recruiting the potential suspect or prospect.
Career	Prospective academic career in which a suspect or prospect has an interest, such as *Undergraduate, Graduate*, or *Continuing Education.*
Admit Type	Admit type for this suspect or prospect, such as *First-Year,Second-Year*, or *Transfer*.
Admit Term	The admit term in which the suspect or prospect is expected to enroll.
Recruiting Status	Indicates the level of interest, at the academic career level, that the prospective student has in the institution.

Field	***Description***
Source Date	Career source date for which the program status record was added. The source date is the date that the data was loaded
Last School Attended	Suspect or prospect's last school attended.
Graduation Date	Graduation date from the last school the suspect or prospect attended. This may be a future date.
School Type	School type (for last school attended) of the suspect or prospect.
Campus	Suspect or prospect's prospective campus if applying to the institution. The campus is associated with the program and is often where the student will attend classes.
Program	Suspect or prospect's prospective interest in an academic program such as *Graduate of Fine Arts Program.*
Lifecycle Status	The individual's Lifecycle Status indicates the perceived level of interest, at the academic program level, that a potential student has in the institution. For example, a person who attended an on-campus event may be considered a suspect (someone who you suspect is interested in the institution). A person who requests a catalog may be considered a prospect (someone who has indicated interested in the institution).
Status Date	Date for which the program status was added.
Plan	Academic plan for which a suspect or prospect has indicated a potential interest.
Sub-Plan	Suspect or prospect's potential interest in a specific academic Sub-Plan. Sub-Plans are areas of further specialization within an academic plan.

Viewing Admissions Information

This section displays a constituent's admissions information. The data originates from the Admissions page of the Student Service Center and the Application Data component in Campus Solutions.

If the constituent is applying for multiple sub-plans within one plan (such as multiple specialties or concentrations), the grid displays a row for each sub-plan.



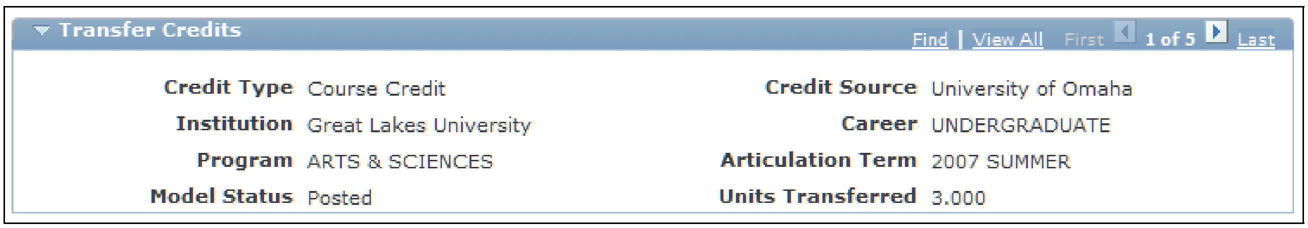
Admissions section of 360-Degree View for Higher Education page

Field	***Description***
Institution	Institution to which the constituent is applying.
Application Number	Unique identification number of the application. The application number will display as zeros if an application has not yet been created.
Career	Name of the career for which the constituent is applying.
Application Date	The date on which the application was received.
Admit Type	Admit type for this application.
Admit Term	The admit term in which the applicant is expected to enroll.
Application Fee Status	Current application fee status for the application. Values include: *Received,Pending,* and *Waived.*
Primary Program	The academic primary program to which the constituent is applying.
Program Status	Constituent's program status. Possible values are *Active, Admitted,* and *Waitlisted.*
Program Action Date	The date that the action was entered into the system.
Program Action	Program action designates the status of a constituent in a program from the time he or she is an applicant and throughout the constituent's academic career. For example, a constituent must have a program action of *Matriculate* to become a student, and a program action of *Activate* in any term in which he or she wants to enroll.

Field	***Description***
Program Action Reason	Indicates why a particular program action was taken, or provides a further description of the program action. For example, the institution can record that an applicant has withdrawn an application for an academic program.
Plan	Academic plan for which a suspect or prospect has indicated a potential interest.
Sub-Plan	Suspect or prospect's potential interest in a specific academic Sub-Plan. Sub-Plans are areas of further specialization within an academic plan.

Viewing Transfer Credits Information

The Transfer Credits section enables agents to view high level transfer credit information for students.



Transfer Credits section of 360-Degree View for Higher Education page

Field	***Description***
Credit Type	Identifies the type of credit information being displayed. Valid values are: *Course Credit,Test Credit,* and *Other Credit.*
Credit Source	Identifies the source of the credit. For *Course Credit* this is the institution in which the constituent earned credits that are being transferred. For *Test Credit* and *Other Credits* this field is blank.
Institution	Academic institution for which the specified individual's transfer credit was processed.
Career	Academic career for which you want to retrieve the specified individual's transfer credit summaries.
Program	Academic program for which you want to retrieve the specified individual's transfer credit summaries.
Articulation Term	Term for which the target institution processes the constituent's transfer credit.

Field	***Description***
Model Status	The status of the transfer credit model. Valid values are: *Submitted,Completed,* or *Posted.*
Units Transferred	The units of the internal equivalent course. Only those units that have been posted will be displayed.

Viewing Academics Information

The Academics section provides academic advisors and other users with an overview of a student's academic information.

The system uses the current term, closest future term, or most recent past term (in that order) to determine which term to display as the most recent term. The specific logic used for this process is:

- Choose the term with the smallest term code in which the *Term Begin Date* is less than or equal to today's date and the *Term End Date* is greater than or equal to today's date.
- If none of the student's terms satisfy the above criteria, choose the student's term with the smallest term code in which the *Term Begin Date* is greater than today's date.
- If none of the student's terms satisfy the above criteria, choose the student's term with the highest term code in which the *Term End Date* is less than today's date.

The data is sorted alphabetically by Institution, Career, and Program.

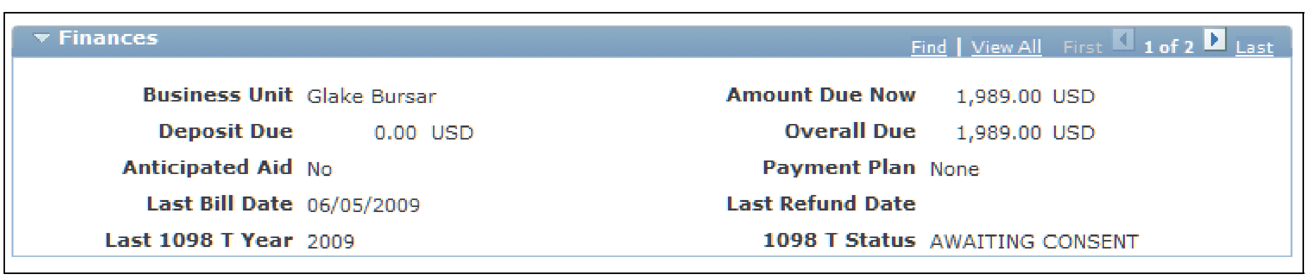
Academics section of 360-Degree View for Higher Education page

Field	***Description***
Institution	Name of institution in which student is enrolled.
Career	Academic career for the constituent.

Field	***Description***
Program	The academic program in which the student is enrolled.
Program Status	Student's program status.
Admit Term	The admit term in which the student is enrolled.
Campus	The campus is associated with the program and is often where the student is attending classes.
Cumulative Units	Includes all passed units including both enrollment and transfer credit.
Expected Grad Term	Term and year in which the student is expected to graduate.
Plan	Academic plan within the academic program.
Sub-Plan	Area of further specialization within an academic plan.
Term	Most recent term for which a constituent has enrolled or has completed.
Primary Program	The constituent's primary academic program for the specified career and term combination.
Academic Load	The student's academic load for the specified career and term combination.
Approved Load	The academic load for which the student is enrolled, and which is approved by the institution for the term.
Term Units	Student's consolidated units for the most recent term.
Academic Standing	Academic status of the constituent.

Viewing Financial Information

The Finances section displays pertinent information regarding the students' account.

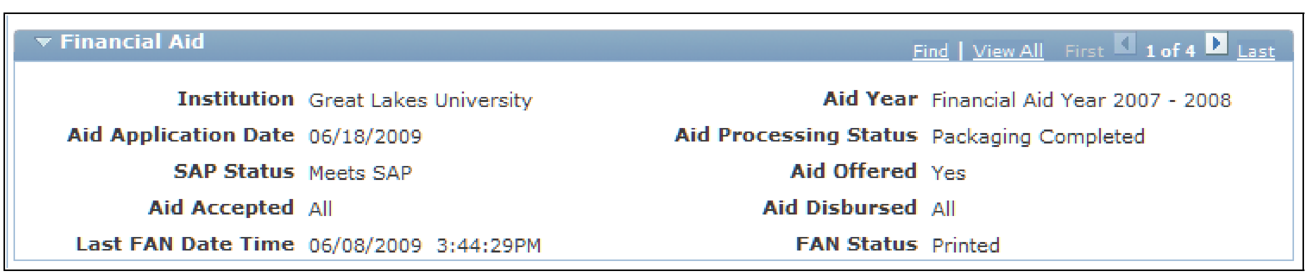


Finances section of 360-Degree View for Higher Education page

Field	***Description***
Business Unit	A business unit can have its own set of business rules that enable campuses to operate independently from each other financially. You must set up at least one business unit.
Amount Due Now	Includes any charges incurred through the current date plus the number of days specified for the days in future for the *due now* field on the Institution Set page associated with the business unit.
Deposit Due	Deposits incurred to date.
Overall Due	Represents past due, current due, and any future due charges for the business unit.
Anticipated Aid	Student's pending or anticipated aid that has not been posted to their account. Values are *Yes* or *No.*
Payment Plans	Indicates whether a student is currently on a payment plan.
Last Bill Date	The last date a bill was generated for the student.
Last Refund Date	The last date a refund was generated for the student.
Last 1098 T Year	Year for which the Last 1098 T was generated for the student.
1098 T Status	Captures the status of the student's 1098-T. Values are: *Transmitted,Printed,* and *Awaiting Consent.*

Viewing Financial Aid Information

The Financial Aid section provides users with the ability to see whether financial aid has been offered, accepted, or disbursed, as well as the date and status of the last financial aid notification letter sent.

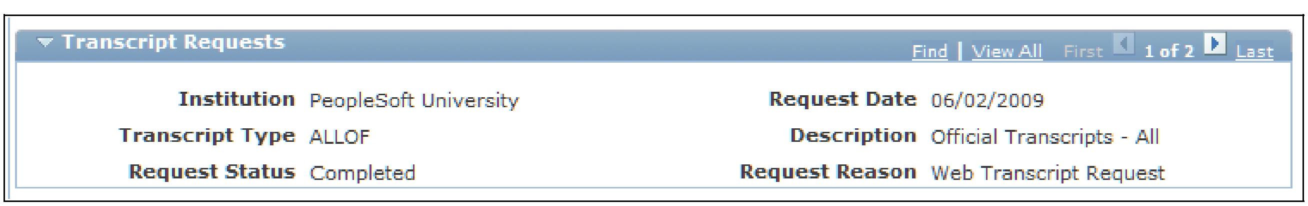


Financial Aid section of 360-Degree View for Higher Education page

Field	*Description*
Institution	Name of institution for which the constituent is applying for financial aid.
Aid Year	The financial aid year.
Aid Application Date	The date the student turned in an application or the date that identified the student as a possible recipient for financial aid.
Aid Processing Status	Indicates the processing status for a student financial aid package.
SAP Status (Satisfactory Academic Progress Status)	Indicates whether the student is meeting satisfactory academic progress (SAP). This is used to determine whether to award federal aid to the student. The SAP global disbursement rules use this field to determine whether to authorize disbursement of the student's award. Also, Common Line Disbursement Hold and Release processing uses this field to determine whether a hold should be placed on the student's Common Line loan.
Aid Offered	Indicates if aid has been offered based on the total of all disbursements for all awards that fall in the same aid year. Valid values are *Yes* (aid has been awarded) or *No* (no aid awarded).
Aid Accepted	Indicates if the student has accepted any offered aid. The valid values are *No,Partial,* or *All.*
Disbursed Aid	Indicates whether aid has been disbursed to the student's financial account. Valid values are *No,Partial,* or *All.*
Last FAN Date	Indicates the date and time the Financial Aid Notification (FAN) letter was created.
FAN Status	Indicates whether the FAN letter has been printed, is awaiting printing, is being revised or has an error.

Viewing Transcript Request Information

This section provides users with an overview of a student's transcript requests.



Transcript Request section of 360-Degree View for Higher Education page

Field	*Description*
Institution	Name of institution in which student is requesting a transcript.
Request Date	Date student requested the transcript.
Transcript Type	Transcript student is requesting such as *Official* or *Unofficial* transcript.
Request Status	The transcript status.
Request Reason	Reason for the transcript request. The reason appears on the transcript if the transcript type is set to display request reason information.

Viewing Contributor Relations Information

This section displays a record of lifetime gifts and pledges made by a constituent and by other individuals with whom the constituent has a personal or organizational relationship.

Contributor Relations section of 360-Degree View for Higher Education page

Field	*Description*
Institution	Name of institution with which the constituent or relative has a history of giving money.
Lifetime Commitment $	Displays the total amount of money ever donated or pledged by the donor.
Lifetime Open Pledge $	Displays the total amount of money promised but not yet donated by the donor.

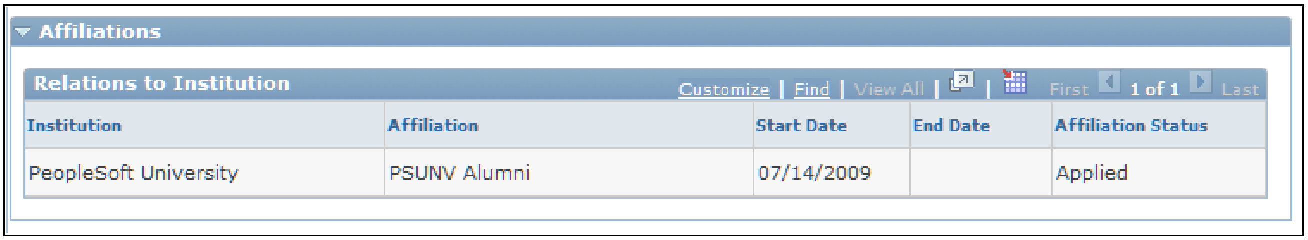
Field	Description
Lifetime Gift/Payments $	Displays the total amount of money ever given by the donor. This amount only includes money actually received, and excludes outstanding pledges.
Lifetime Hard Credits $	Displays the total amount of hard credit given to the donor for recognition purposes.
Total YTD Giving $	Displays the total amount in gifts and pledge payments the donor made to the allocation account during this fiscal year.
Total Years Giving	Displays the total number of years in which the donor has given to the institution. Only hard credit recognition is used to calculate this field.
Consecutive Years Giving	Displays the total number of consecutive years in which the donor has given to your institution. The value in this field resets to zero if more than one year has passed since the donor's most recent gift.

Relationships

Field	Description
Name	Displays the name of the donor.
Relationship	Displays the donor's relationship to the constituent. Only active relationships are displayed.
Lifetime Gift/Payments $	Displays the total amount of money ever donated by the donor who has a relationship with the constituent. This amount only includes money actually received, and excludes outstanding pledges.
Currency	Currency of the Lifetime Commitments, Lifetime Open Pledge, and Lifetime Gifts/Payments.

Viewing Affiliations Information

This section provides a history of the constituent's active and inactive relationship with the institution.



Affiliations section of 360-Degree View for Higher Education page

Field	***Description***
Affiliations	Indicates the constituent's relationship to the institution.
Start Date, End Date	Start and end dates of the affiliation.
Affiliation Status	Indicates the current state of the affiliation. Valid values are *Active* or *Inactive.*

Part 3

Business Processes

Chapter 10

Managing Cases

This chapter provides overviews of the configurable case, case access, and case management and discusses how to:

- Search for existing cases.
- Manage basic case information.
- Validate errors reported by callers.
- Integrate with third-party asset management applications.

See Also

Chapter 11, "Processing Cases," page 303

Understanding the Configurable Case

In PeopleSoft CRM one Case component supports all PeopleSoft CRM Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education applications, as well as the related industry solutions.

The system stores the display template family code within the Case component. The display template family code identifies the type of the Case and may provide several display template IDs that a user can choose from.

Display template IDs control the appearance and behavior of the Case component and its pages to support the varied business needs of call centers. An implementer can choose to show or hide pages, sections, and fields. An implementer can also control field labels.

Understanding Case Access

This section discusses:

- Case creation.
- Case retrieval.
- Saved searches.

See Also

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Working with Multichannel Applications"

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Configuring Multichannel Applications"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Using the 360-Degree View," Accessing the 360-Degree View

Chapter 11, "Processing Cases," Managing Related Cases, page 322

Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Call Center Business Units, page 28

Case Creation

You can create new cases in several ways:

- Navigate to your PeopleSoft call center application (Support, HelpDesk, HR HelpDesk, or Analyst Service Center) and select Add Case.

  When users want to add new cases, they are taken directly to the Case component in Add mode. Users can search for customers or employees directly on the Case page, thus increasing efficiency and usability. Users can also enter information about the case before identifying the customer.

  As delivered, the Analyst Service Center provides creation and retrieval of three different types of case (each based on a separate Display Template ID). These cases are tailored for Information Technology (IT)-related cases, non-IT (support) cases, and blended cases (which may be used to track either IT or non-IT cases).

  Note. You can also use the Support Center,Help Desk Center, or HR Help Desk Center links from the Home page to navigate through the applications and add new cases.

- Use Quick Create functionality.

  Use the Quick Create function to provide service quickly to create new customers, consumers, contacts, and workers.

- Use a computer telephony integration (CTI) system to identify a caller.

  The CTI system enters caller information on the 360-Degree View page. From there, you can access the Case page to create a new case. The system populates customer or contact information on this page from the 360-Degree View page.

  Note. An agent may also use the 360-Degree View page without CTI to gather information about the customer before entering a new case.

- Clone an existing case by clicking the Clone Case button on the case toolbar.

  Use this method when the new case is substantially similar to another case.

- Create a new case from the Related Cases page of an existing case.

  Use this method when the new case is related to an existing case. This method enables you to establish the relationship between the cases at the same time that you create the new case.

  Using this method, you can select the type of information to copy to the new case. If you do not copy caller information, you can identify the caller using the appropriate fields on the new Case page.

- If an implementer enables the Agent - My Cases pagelet, agents can create cases without leaving their personal case access portal.

- In the email workspace, agents can make use of email handling options to create and associate a case to an email to support the completion of the correspondence.

- If an implementer enables the configuration option for a group worklist to create cases for new inbound email, the system creates a case for each incoming unstructured email that ERMS receives and routes to that group worklist.

  See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up and Using Worklists," Defining Group Worklists.

Note. To generate a case ID before a case is saved, implementers and administrators can select the Case ID Before Save check box on the Call Center Definition - Options page. This feature is useful if you want to provide customers with a case ID before the agent enters all the problem information. Note that if the agent provides the customer with a case ID for their reference and the agent tries to save a case and is not able to, the customer has a case ID that is not recorded in the system.

Default Contact Information

When you create a new case, the system enters default contact information for the caller.

For PeopleSoft Support, when a user selects both the customer and contact, the contact information is obtained from the contact's preferred primary phone and email information.

For PeopleSoft HelpDesk and HelpDesk for Human Resources, a user selects an employee rather than a customer and contact. They can also enter an alternative contact in addition to an employee. In this case, the contact information comes from the alternative contact instead of the employee.

For PeopleSoft Service Center for Higher Education, user may select an individual consumer (a category which includes individual students), a company and contact, or an employee (staff or faculty member).

Case Retrieval

Access an existing case directly from your My Cases pagelet or use the Case Search page. You can perform a search based on case information (such as the case number) or caller information.

If you know the case number, you do not have to identify the business unit before searching. If you are searching based on other criteria, enter a business unit before performing the search.

Note. The number and type of information fields on the Case Search page that are used to search for cases is determined in the Configurable Search Definition, which is associated to the Display Template.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates" and *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages."

If you use CTI to access the Case page, the system normally bypasses the Case Search page because the CTI system provides the data that would otherwise be found through the search mechanism. However, if a caller provides an invalid case number, the system cannot go directly to the Case page. Instead, it displays the Case Search page and enters the data that is provided by CTI into the search fields. Because the appearance of the Case Search page indicates that the case number is invalid, you must delete the invalid case number before performing a search.

Note. When a case is secure, only agents in the assigned provider group are authorized to open the case. If you use CTI or the 360-Degree View page to access the Case page and the system tries to send the case to an agent who is not authorized, the agent receives a message stating that he or she is not authorized to open the case. To avoid this situation, consider the secure case scenario when you configure your routing rules.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Understanding Call Center Business Units, page 15

PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook, "Configuring CTI"

PeopleSoft Enterprise CRM Portal Pack 9.1 PeopleBook, "Working with CRM Employee-Facing Pagelets," Using PeopleSoft Support Pagelets

Saved Searches

Saved searches enable you to reuse case search criteria. The system saves searches under your user ID by maintaining separate lists of saved searches for each user.

The behavior of the saved search depends on how the search page was set up on the Configurable Search Setup page. The system administrator can choose to populate the results grid automatically with the most recently used search criteria or with the user's default saved search. If the administrator selects the check box that enables users to choose how the results grid is initialized, then users have the option to:

- Save search criteria.
- Personalize available search fields.
- Decide how the results grid is initialized.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Search Pages," BO Searches on Configurable Search Pages

Understanding Case Management

This section discusses:

- Case page activities.
- Quick codes.
- Case information security.
- Case assignments.
- Case visibility
- Case closure.
- Case toolbar functions.
- Toolbar functions.
- Background processing.

Note. This chapter discusses Case page activities. Subsequent chapters discuss additional case processing that take place on other pages in the Case component.

Case Page Activities

Depending on the display template, the Case page can be divided into the following sections:

Note. Sections marked with an asterisk (*) are delivered enabled when you first install the application. The display template controls the visibility of the other sections.

- Partner information section (not available for PeopleSoft HelpDesk applications).
- Customer information section. *

  This section is titled Employee Information for PeopleSoft HelpDesk applications.
- Academic Information section (associated only with PeopleSoft Service Center for Higher Education).
- Problem section. *
- Case Information section. *
- Actions section. *
- Add a note section.
- Incident address section.
- Dispute Information section (not available for PeopleSoft HelpDesk applications).

- Complaint Information section (not available for PeopleSoft HelpDesk applications).

Note. The Dispute and Complaint sections are intended for the Financial Services (FSI) and Communications (COM) industries. You can display these sections, but they are not useful or fully functional unless you use the additional industry functionality.

See Chapter 11, "Processing Cases," page 303.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Partner Information Section

The Partner section options appear on display templates only if PeopleSoft Enterprise Partner Relationship Management is installed. To display the options on the Case page, you must select the desired options from the Partner section. You can elect to display the options grouped in a section of the Case page or as separate fields (such as Partner and Partner Contact) on the Case Information section (Main sub-page) of the Case page.

If you have purchased PeopleSoft Enterprise PRM for Service, the display template contains the Partner section and field options, which are delivered disabled. You can select from two display layout options: on the Case Information section or as its own Partner section on the Case page.

Customer Information Section

In PeopleSoft Support, the case's Customer Information section contains customer fields. The same section for a PeopleSoft HelpDesk or HelpDesk for Human Resources case contains employee fields.

In Service Center for Higher Education, you can search for a company (and company contact), consumer, or worker. Note that students (constituents) have the role of consumer within the Service Center for Higher Education application, while staff and faculty have the role of worker. An individual with the role of company contact who also has the role of consumer or worker will show up multiple times in the search results (both as an individual and as a representative of the company). However, individuals who are not company contacts will show up only once in the search results, even if they have both the role of consumer and worker.

Consider the following when using the Customer Information section:

- If you are searching for a company, you can enter a partial value in the Company field and click the Search button.

  The system returns a list of companies that begin with the value you entered in the Company field. If only one company matches your search, the system displays a page with all of the contacts for that particular company. When creating a case for a company, you must identify a contact person. A contact person is optional if you are creating a case for a consumer.

- If you are searching for a consumer, you can enter a partial value in either the First Name or Last Name field and click the Search button.

  Do not enter anything in the Company field.

- If you want to edit a contact's contact method for the case, click the Edit link to launch the Edit Contact Information page.

  This page lists the contact information for the selected contact. The system lists only address information for HelpDesk for Human Resources cases.

- Business Object Search functionality controls the appearance of customer search fields and some of the other fields.

  Note. For PeopleSoft HelpDesk applications, the appearance of certain fields is controlled by the secure worker role.

  See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Understanding BO Search and Quick Create Setup.

- If a case is created automatically by the system for an inbound email message (a feature that can be enabled in any group worklist definition with the installation of ERMS), the email sender (identified by the email address) is populated as the customer contact of the case.

  If the email address does not match any of the customer record in the CRM system, one of these two things happens based on the setup of the mailbox to which the inbound email is routed—either a new customer (a Person record) is created using the email address and becomes the contact of the case, or the *Anonymous User* person record is used as the customer (consumer) of the case. On the other hand, if multiple matches are found for the email address, the Select Sender link appears in the Customer Information section, indicating that the call center agent needs to choose an email sender as the case customer.

  A case customer must be identified before a case can be saved, unless the Anonymous Caller option is selected on the case.

  See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Setting Up and Using Worklists," Defining Group Worklists.

The Customer Information Section is grouped using an expandable group box layout. Use the display template to control how the fields appear in each section.

Note. If you select an incorrect company, you can search again to select the appropriate company. For PeopleSoft HelpDesk customers, one person can enter a case on behalf of another person. You can select the employee associated with the case, select an alternative contact, and then click the Edit button to enter contact details for the case.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Academic Information Section

This section is enabled for cases in Service Center for Higher Education. It displays a summary of the academic information (such as institution, program and plan) that is associated with the constituent. The fields in this section are not editable (any required updates to the information should be processed in the PeopleSoft Campus Solutions application).

Because individuals may be linked to more than one institution, program, plan, or sub-plan, the information in this section is presented in a scroll area, so that multiple sets of information may be viewed.

Problem Information Section

This section discusses two fields: Summary and Description.

The Summary field is required. The system can be configured so that values for the Summary and Description fields can be entered by default on the Case page when the user selects a quick code. If a problem summary is already entered on an existing case, a quick code will not overwrite the Summary and Description fields unless the overwrite check box is selected for either the Summary or Description fields in the quick code. In this case, you can overwrite the values for the Summary and Description fields even if these fields are already populated.

Note. Call center agents can also use text trays and quick keys to automatically fill static and dynamic data into the Description field.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with the Text Tray."

Case Information Section

The fields in the Case Information section are grouped using the configurable Embedded Tabs section layout. By default, the system displays the Main and More tabs. Use the display template to determine the number of tabs, their labels, and the fields that you want to appear.

This section discusses how to:

- Secure a case.
- Enable the creation of a case with an anonymous caller.
- Enable the creation of a case that specifies a site as the customer rather than a person or company.

  This capability is useful for service calls that must be specified by location rather than by a contact name or billing entity.
- Display the business unit associated with the case.
- Select a quick code.

  You can configure a quick code to populate other fields.
- Categorize a case.

  The Category,Specialty Type, and Detail fields can affect the way in which the system assigns provider groups and agents to the case.
- Assign a case.

  You can assign a case in many ways. You can configure the system to automatically suggest a provider group and agent.
- Associate and describe a product for which support is extended.

  You can record its placement within a product hierarchy, serial number, where it was purchased, and whether it is installed.

- Record asset information.

  You can track company equipment with identification numbers and track whether the equipment is installed.

- Track the reported problem.

  You can prioritize and categorize problems by type and severity, create and assign error codes and messages to attach to the problem, and record the response and outcome.

- Perform an entitlement search.

  PeopleSoft call center applications enable you to set up agreements and warranties that govern and track a customer's or an employee's entitlement to support. To control the way the system searches for agreements, you can use the configuration options available on the Agreement Search Configuration page. You can also use the Active Analytics Framework (AAF) to set up automatic agreement searches.

  See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties."

- Authorize a credit card.

- Review response times.

  You can view the service-level agreement information about expected and actual response and restore times. A customer's entitled response and restore time takes a business's hours of operation into consideration. The system uses the same logic for holiday schedules. If an agreement is entitled with regular hours of operation but the business is closed on public holidays, the entitlement takes the holiday schedule into account. On the Service Level page, you can use the Holiday Schedule field to select the holiday schedule that you want associated with the service level. The system provides the holiday schedule by default to the agreement line when the service level is specified.

- Review survey scores.

  If you have permission to view the Survey Score field, you can review the scores generated by the surveys that were sent to customers by email. You can also review the actual survey by clicking a link on the Related Actions page in the Case component after the customer has filled out the survey. This field, however, does not appear on the page unless you enable it on the Display Template - Page Definition page. You must also sign in as a user with permission to view this field; otherwise, it does not appear on the page. You can set up your system so that an agent can send a survey manually to a customer's email address, or you can use AAF to automatically send surveys to customers when agents close cases. To run and view reports that show survey scores for particular agents or types of cases, refer to the documentation for your PeopleSoft Enterprise CRM 9.1 Online Marketing application.

Actions Section

The link categories that you or your implementation team set up during installation appear in the Actions section on the main Case and Summary pages. You can link to pages such as those in the Human Resources database (used in HelpDesk for Human Resources) or the PeopleSoft Campus Solutions application (used in PeopleSoft Service Center for Higher Education), or you can link to related actions, business projects, change requests, and so on.

Using AAF policies or by selecting a quick code, you can configure your system to automatically suggest an action. You also can manually select an action from the Actions section.

Only those link categories and definitions that are associated to a link group—which is associated to a display template—appear in the Actions section.

See Chapter 5, "Setting Up Links and Related Actions," Viewing and Modifying Link Groups, page 145.

Add a Note Section

The Add a Note section, which is delivered as hidden, provides a note field on the main Case page. Each time users open a particular case, they can only add one note on the Case page. Once a note has been added on the Case page, it may be edited there, if desired, until the user exits the case. However, to add additional notes without exiting and re-opening the case, the user must use the Notes page. On the Notes page, agents can always add new notes, as well as view and edit existing notes.

Note. To create a note using text tray functionality, you need to be on the Notes page.

See Chapter 11, "Processing Cases," Adding Notes and Attachments, page 307.

Incident Address Section

This section is delivered hidden. If you want to make the Incident Address section visible, modify the display template to enable this section.

In the Incident Address group box, you record information about the location of the incident.

In this group box, you can:

- Enter either a street address or the intersection for the incident.

  If the system is integrated with Environmental Systems Research Institute (ESRI) software to generate maps, the address must include at least the Address 1 field and the zip code. Location by intersection requires two cross streets.

- Describe additional information about the location using free-form text.

Dispute Information

If you purchased the PeopleSoft CRM Communications solution, you can enable the display of information, fields, and action links specific to the recording of complaint calls concerning telecommunications services.

The dispute information section offers a selection of fields and details specific to handling billing disputes, including:

- Bill date and period.
- Adjustment type and amount.
- Reason for the dispute.
- Communications-specific case search definition.

Actions include these industry-specific action links:

- Business Project

- Create RMA (return materials agreements)
- Defect - Create New
- Defect - Relate
- Sales Lead
- Sales Order
- Service Order

Note. Some of the information in this section is related to Actions and the Case Search functionality, which is part of the overall communications industry solution. Information in this section is not necessarily related to the Dispute functionality.

When enabled, the Dispute Information section appears when the Case Type is *Bill Dispute,* which is an option available only in the telecommunications solution.

To activate this functionality you must select the Dispute Information check box on the Display Template - Page Definition page.

Note. To dispute a bill and open a new case, you must first access the Account - Balance page within the Customer Accounts component and click the Dispute Balance button associated with the item you are disputing. Clicking the Dispute Balance button opens a new case for the customer and makes the case type a read-only field with the value equal to *Dispute.* You cannot manually select *Dispute* as the case type on the Case page.

Complaint Information

Although not exclusive of all other call center applications, the Complaint Information section is designed for support response in the insurance and financial services environment. Features of the Complaint Information section include:

- The Complaint Details section offers this selection of specific fields and details:
  - A description of the cause.
  - Reimbursement information.
  - Communications records.
  - Personnel involved.
  - Check boxes for follow-up actions.
- An industry-specific case search definition.
- A set of action links for insurance and financial product support.

  Action links are Business Project and Sales Lead. The suggested action is *Create Workflow.*

  Note. Some of the information in this section is related to the overall solution for the Financial Services and Insurance industries. It is not necessarily related to the Complaint functionality.

To specify the display of complaint information, select *Complaint* for the Case Type on the Case page. Make sure, however, that the Complaint Details section is enabled on the Display Template - Page Definition page.

Note. The system displays the Complaint Information section on the Case page only when the user has selected the section on the display template and selected *Complaint* as the Case Type on the Case page. For support cases, when a user selects *Complaint* as the Case Type but the section is hidden on the display template, the system does not display the Complaint Information section on the Case page, and it does not save any complaint information to the database.

Note. Two case type fields can be enabled through the display template. One enables a server trip and one does not. It is recommended that you enable the one with the server trip if you are using the Complaint or Dispute sections in your application. Enabling the field with the server trip exposes certain sections and fields on the Case page that you can fill out; these sections and fields are related to a complaint or dispute.

To enable the Case Type field to make a server trip when it is selected, go to Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details, Case, Show Section Details. In the CASE_INFO section, select Case Type - Non deferred (RC_CASETYPE_NONDEF).

See Also

Chapter 5, "Setting Up Links and Related Actions," Basic Link Setup, page 99

Quick Codes

You can use quick codes to populate these fields on the Case page:

- Note (Summary and Description)
- Problem (Summary and Description)
- Case Status
- Case Priority
- Case Impact
- Urgency
- Case Severity
- Provider Group
- Assigned To
- Case Type
- Case Subtype
- Category
- Specialty Type
- Detail

- Error Code
- Error Message
- Interested Parties
- Product ID
- Product Group
- Suggested Action (Link Category, Version, Link Name)
- Solution and solution status

Case Information Security

You can control the visibility of the Secured check box by using a display template. When an agent determines that a case is sensitive, he or she can select the Secured check box in the Case Information section of the template to specify that the case should be viewed only by individuals associated with the provider group on the case.

When a case is marked secured, the agent must specify a provider group before saving the case. Once the agent secures the case, it is associated with the provider group. Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, the agent cannot access the secured case.

Note. Security is implemented on specific pages throughout the system. If your organization modifies the system to show case summary information on additional pages, you must secure the information appropriately.

The word *Secured* is substituted for the case summary on the following pages:

- Case Search.

  Secured appears in the Problem Summary field of the search results grid both when accessing a case and when searching for a case to relate to another case.

  Note. The other fields in the search results grid display actual case data; therefore, agents can view the case status or the assigned agent without accessing the case. This limited visibility enables even non-authorized agents to provide limited support when callers inquire about a secure case. The link to access the case, however, is disabled for unauthorized users.

- 360-Degree View for authorized and unauthorized cases.

  The 360-Degree View page for PeopleSoft HelpDesk for Human Resources and the Constituent 360-Degree View page for Service Center for Higher Education each have two case nodes, one for cases that cannot be accessed (unauthorized) and one for those that can (authorized).

  Secured appears if the Case node in the action tree is configured to show the case summary. You can also configure the unauthorized node to show the summary of the secured case. The 360-Degree View page for PeopleSoft HelpDesk for Human Resources and for Service Center for Higher Education is delivered showing only the case status and count. For 360-Degree Views that are not related to these two applications, secure cases are not hidden or disabled on these pages or sections.

- Related Cases.

- Solution - Related Actions.
- Solution pages.

  Secured appears in the search results grid.
- Worklist.

  Secured appears if the agent is not in the provider group.
- Email notifications (automated and manual).

  The PeopleSoft system does not prohibit users from emailing case information to other users who don't have access to the case (for example, through the Outbound Notification page). The summary does not change for email notifications about secured cases.

Note. When an agent prompts for cases, the system displays only those cases that the agent is authorized to access. To access a secured case, the agent must be a member of the provider group associated with the case.

Configuration Issues for Secured Cases

To avoid sending out information about secured cases when you are setting up AAF policies, business projects, workflow actions, and email templates, use the Secured Case field (SECURE_CASE_FLG) on the Case page (RC_CASE) to define record field conditions.

For example, suppose you want to suppress secured cases from being viewed by unauthorized users. You can define an event to perform a check for a value equal to *N* on the SECURE_CASE_FLG field before displaying or distributing case information.

Note. Secured case functionality can be used by any call center application. However, this functionality is delivered only for PeopleSoft HelpDesk for Human Resources. The secure case flag is part of a condition to make sure you don't send out secure information. AAF policies do not automatically treat secured cases as special.

Case Assignments

You can assign a case to any worker except future-dated workers. The worker to whom a case is assigned is the case owner, even if other agents or specialists are helping the assignee.

You can also assign cases to provider groups rather than to individual agents. Provider groups are pools of agents with something in common, like agents who support a certain product or work at a particular call center.

You can assign cases by:

- Entering the provider group or agent name manually.

- Invoking the assignment engine, which suggests an assignee.

  The assignment engine attempts to match the person or provider group with all of the competencies associated with the case category, type, or detail, whichever level is appropriate for the case.

  Additionally, because you can associate competencies with problem types, the assignment engine attempts to match the person or provider group with the competencies listed for the problem.

  You can set up the assignment engine to assign cases to provider groups according to the competencies associated with problem types and then to assign cases to agents according to the competencies associated with category, type, and detail.

  See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches."

  Note. Based on how you configure the system, the assignment engine will also uses product, customer, region, and location information.

- Entering a quick code.

  You can enter a quick code that is associated with a default assignee (either a provider group or an agent).

- Having the system assign the case at save time.

  Auto-assignment options that are configured in the Call Center Business Unit component occur only if you have not already assigned the case. If you use AAF policies to assign the case, the event definitions determine the conditions under which the assignment occurs.

Assignment Notifications

The PeopleSoft system delivers call center workflow to send notifications when a case is assigned or reassigned.

If you assign cases to provider groups (without specifying an agent within the group), you can use AAF policies to send an assignment notification to the provider group's worklist. Usually, the worklist monitor assigns the worklist item, the case, or both to an individual. The PeopleSoft system is not delivered with this workflow turned on, however. To use this functionality, you must reset the end date in the AAF policy.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Call Center Business Units, page 28

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Maintaining Provider Groups and Group Members," Understanding Provider Groups and Group Members

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Case Visibility

To prevent employees from viewing sensitive case information (for example, grievances) through the HelpDesk self-service applications, the PeopleSoft system includes a value called *Internal, exclude Case Contact* in the Visibility drop-down list box on the main Case page.

When a user selects *Internal, exclude Case Contact,* the employee who is the subject of the case is unable to view the case through the HelpDesk self-service application.

The person who reported the case (Reported By) can view it in the self-service application if the case is not secured. When a case is secured, the Reported By person will no longer be able to view the case in the self-service application.

When an agent selects the *Internal, exclude Case Contact* visibility value and clicks the Notification button, the system displays a warning message to the agent that the employee does not have visibility to this case. In this situation, you would not want to send a notification to the employee.

The system does not display the employee name and email address in the Recipients grid on the Outbound Notification page.

The Case Contact role query has been modified so that it won't return the case contact when the agent selects the *Internal, exclude Case Contact* visibility value. This modification prevents the agent from sending a notification to the employee in question.

To update a secured case when the visibility is *Internal, exclude Case Contact,* the PeopleSoft system has a new policy called Case Visibility Changed.

When a case is secured, an agent that does not belong to the provider group can't open the case. This safeguard prevents the agent from opening the case from the 360-Degree View page and discussing it with the employee in question.

Note. This feature is only applicable to PeopleSoft HelpDesk and HelpDesk for Human Resources.

Case Closure

The Case Status field on the Case page shows where the case is in its life cycle. You close a case by selecting the appropriate status in the Case Status field.

Case status values vary by implementation, but all case statuses fall into one of these categories:

- Open
- Closed
- On Hold
- Canceled

These processing rules are based on the case status categories:

- Your business unit settings determine whether you can reopen canceled or closed cases.

  You can also set up the Call Center Definition - Case Defaults page to change the status automatically when an agent obtains a successful resolution.

  See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15.

- When you close a case, the current date and time are entered in the Closed Date field; if you reopen the case, the Closed Date field is cleared.

- If a case is associated with a solvable action, you can close the case by selecting the action.

- You cannot close a case until it has either a resolution associated with it or a solvable action associated with it.

  You can set up your system to prevent the closing of cases unless there is a business project associated with the case. To do this, however, the business project related action must be marked as solvable on the Link Definition page. If the business project is marked as solvable and it is associated with the case, the business project doesn't need to be closed before you can close the case.

- You can set up the system at the business unit level to allow cases to be resolved after sending outbound notifications from them.

  When this option is selected, the Send and Solve toolbar button appears on the Outbound Notification page. When the user finishes composing the message and clicks the button, the system sends the notification out to recipients and solves the associated case transaction by setting its status to the predefined resolved case status (for example, *Closed - Resolved*).

  If the outbound notification requires approval from a supervisor, the system resolves the associated case upon receipt of the approval from the supervisor.

  See Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Business Rules for a Call Center Business Unit, page 32.

When cascading statuses through related cases, these rules also apply:

- Changing the parent case's status changes the status of all child cases unless:
  - The child case is associated with an open case.
  - The child case is in a closed or canceled status that is not the same as the parent's original status.
- You can close a case using more than one resolution.
- Closing a parent case cascades the successful solution to the child cases that are associated with the parent case.
- Reopening a parent case changes the successful solutions in the child cases to failed solutions.
- When a case is closed, it becomes read-only except for the Case Notes and Resolution Status fields.

  This flexibility accommodates instances for which multiple resolutions can close a case for that business unit.

Note. A solvable action will not cascade to the other cases, but a successful resolution will.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Using Solutions," Understanding Case, Service Order, and Defect Resolution

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Performing Entitlement Searches for Cases and Service Orders"

Case Toolbar Functions

The toolbar at the top of all of the pages in the Case component provides access to several common activities. The toolbar is configurable; these activities are available only if the toolbar is active.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars."

The PeopleSoft system delivers configurable toolbar definitions, one for each application.

Common Call Center Toolbar Buttons

The configurable toolbar in all call center applications contains these buttons:

- Print
- Spell Check
- 360-Degree View
- 360-Degree Search
- Text Tray
- Notification
- Email
- Time Entry
- Search
- Next
- Add
- Update
- Clone Case
- Correspondence

Additional Toolbar Buttons for PeopleSoft Support

In addition to the common buttons, the toolbar for PeopleSoft Support contains these buttons:

- Upsell
- Order
- Map Dashboard
- CTI Dialout

  If customers implement their own CTI switch, they need to implement a new Javascript function that is specific to the CTI switch. PeopleSoft CRM delivers a Javascript function that works with the delivered CTI definitions, so when an agent clicks the button, an outbound call is made for the phone number listed on the case. If customers have a specific CTI switch implementation, they must add a new Javascript function for the implementation (the Javascript function file should be located in the <PS_HOME>/cs/ps/pCti directory) and register it in the CTI component of the CRM system.

  See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Configuring CTI," Setting Up CTI System Definitions.

- Get Offer/Promotions

Note. You must use PeopleSoft's AAF functionality to activate the Get Offer/Promotions button; this functionality is not delivered. When AAF policy conditions are met, the existing Upsell Configuration on Case action displays the Get Offers icon on the Case toolbar. This action is modifiable to present the Get Offers/Promotions button based on rules that are evaluated by the existence of a third-party optimization engine. Agents can also initiate branch or advisor scripts associated with the offer for scripted selling.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

See Chapter 5, "Setting Up Links and Related Actions," page 99.

Additional Toolbar Buttons for PeopleSoft HelpDesk

In addition to the common buttons, the toolbar for PeopleSoft HelpDesk contains these buttons:

- Asset Discovery

  Provided that system and data integration has been accomplished, this button launches an asset management application, which passes the desired asset information to the application for reporting.

  You can also launch asset discoveries from the:

  - 360-degree view of an employee.
  - Case toolbar.

- Remote Control

  The Remote Control button launches a third-party remote control process that enables an IT agent to:

  - Remotely query for data from an installed product or asset.
  - Run a process to remotely take control of an employee's computer to resolve a problem.

See Chapter 10, "Managing Cases," Integrating with Third-Party Asset Management Applications, page 300.

Additional Toolbar Buttons for PeopleSoft Service Center for Higher Education

In addition to the common buttons, the toolbar for PeopleSoft Service Center for Higher Education may contain these buttons (depending on whether the user has accessed an IT, non-IT, or blended case):

- Upsell Opportunity Alert
- Order
- Map Dashboard
- CTI Dialout

  If customers implement their own CTI switch, they need to implement a new Javascript function that is specific to the CTI switch. PeopleSoft CRM delivers a Javascript function that works with the delivered CTI definitions, so when an agent clicks the button, an outbound call is made for the phone number listed on the case. If customers have a specific CTI switch implementation, they must add a new Javascript function for the implementation (the Javascript function file should be located in the <PS_HOME>/cs/ps/pCti directory) and register it in the CTI component of the CRM system.

  See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Configuring CTI," Setting Up CTI System Definitions.

- Asset Summary
- Remote Control

  The Remote Control button launches a third-party remote control process that enables an IT agent to:

  - Remotely query for data from an installed product or asset.
  - Run a process to remotely take control of an employee's computer to resolve a problem.

Notifications

The Notification toolbar button provides convenient access to case-related communication and worklist tasks. Clicking this button:

- Launches the Outbound Notification page for users to compose and send email and worklist notifications.
- Launches the email workspace for users to respond to existing email messages that are associated with the case. Email workspace can be used for sending new adhoc emails based on system setup.

  This function is available with the installation of Multichannel Communications.

Time Tracking

When you create a new case, the system creates a time record for the case. For the system to do this, you must first set up autonumbering for time records.

Important! Because the system creates a time record for every case, you must set up autonumbering for time records even if you don't track the time that you spend working on cases.

To track the time that you spend working on a case, click the Track Time button in the case toolbar to access the Manage Time page.

Use the Manage Time page to record the start and end times for each block of time that you work on the case. Unless the case is resolved during the first call, separate time records will exist for the different blocks of time spent working on the case. Every person who works on a case needs to record time separately.

The time entry record is created the first time that the case is saved in the agent-facing component. For cases created elsewhere (for example, cases created in self-service, through cloning, or through related case functionality), the system does not create the time record until the case is accessed and saved in the agent-facing component. If a user clicks the Track Time button for a case that does not yet have a time record, the system prompts the user to save the case first.

When you add a new row to the time record, the system enters the name of the currently assigned agent to that row. If your name does not appear as the currently assigned agent, change this value to your own name.

The system enters the current date and time as the start time. These default values are helpful for agents who create the time record when they start working on a case and then return to the time record later to enter the end time. If you create the record at the end of a block of time when you've worked on the case, you must override the default start time.

Note. If an existing case has time recorded, and an agent subsequently changes the Business Unit on the case, the existing time entries will be updated to the new Business Unit.

Upsell Opportunities

This functionality is available only in PeopleSoft Support and PeopleSoft Service Center for Higher Education.

If a caller reports a problem with an old or superseded product, you might want to recommend that the caller upgrade to a newer product. A flashing button, which appears on the toolbar on the Case page, alerts agents to a potential upsell opportunity.

The flashing button is triggered based on conditions set up in an AAF policy. For example, you can trigger the upsell toolbar button to flash when a customer is identified or when a product is selected and the case has a specified priority.

If you have installed PeopleSoft Enterprise Advisor, it is used to recommend a product to upsell. If Advisor is not installed, a branch script is used. Branch scripts are associated with specific products. Clicking the button launches either Advisor or a branch script and adds it to the list of related actions for the case.

Note. You can also control how the toolbar buttons behave using AAF policies.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case Upsell Actions.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

From the Actions section on the Case page or from the Related Actions page, you can transfer directly to the Order Capture page. Whenever possible, the system maps branch script answers to corresponding fields on the Order Capture page. This mapping is accomplished using variables associated with the branch script. For example, the system maps the Product field (if it appears) to the Order Capture page.

Text Trays

Call center agents can use text trays and quick keys to auto-fill static and dynamic data, reply to emails, create text for ad hoc notifications or emails, or create notes about a case.

You can use both public and personal quick keys in text tray-enabled text fields within transaction pages. You can also create and maintain your own set of personal quick keys.

Administrators and implementers can manage and create public quick keys. They can create two types of quick keys:

- Dynamic quick keys are comprised of static text and a dynamic token, which pulls the value from the database.
- Static quick key always resolve to straight text.

You can create quick key categories and edit existing and delivered categories, edit existing quick keys, group quick keys into categories, and determine the key sequence for hot keys.

You can use the Quick Code functionality to auto-populate these fields in PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources:

- Problem - Description field on the Case page.
- Details field on the Notes page.

For example, you can have a quick code that automatically fills out the case and inserts text into the Problem - Description field. Included in this text could be the #123 quick key code, which would resolve to text through the Text Tray functionality.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Quick Codes, page 75.

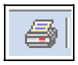
See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with the Text Tray."

Toolbar Functions

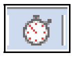
Access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, or Service Center for Higher Education. The toolbar at the top of the Case page and all pages in the Case component include a row with buttons and a time zone control.

The toolbar configuration controls which buttons appear. As delivered, the button row in the toolbar displays some or all page elements. Page elements that are common across all applications are documented in the *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook.*

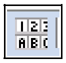
See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars."



Click the Print button to launch a separate browser window that you can use to print case information and change print options.



Click the Time Entry button to access the Manage Time page, where you can track the time that you spent working on the case. You are prompted to save the case before you access the Manage Time page. This button appears only after an agent saves the case for the first time.

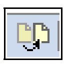


Click the Text Tray button to launch the Text Tray page, where you can select a quick key that will automatically enter pre-written text into the Description field on the Case page and the Detail field on the Notes page in the Case component.

Click the Update button to access the Case Search page in Find an Existing Case mode.

Note. The Configurable Search Setup pages determine what result set (if any) appears when you click the Update Case button.

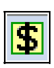
See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages," Configuring Searches.



Click the Clone Casebutton to create a new case with the same caller information and problem information as the existing case. The system creates the new case and displays a message providing the new case number. After you click OK in the message dialog box, the system displays the new case in a new browser window.

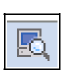
Agreements, warranties, solutions, notes and attachments, case history, related cases, related actions, and interested parties are *not* copied to the new case, and the Resolved by First Contact check box is always clear in the new case.

Click the Order Capturebutton to access the Entry Form page in the Order Capture component. The system automatically populates the customer and product data on the Entry Form page.

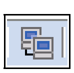


Click the Upsell button to run the upsell script. This button appears only if an upsell script is associated with the product and if other business unit-specific upsell criteria are met. This icon changes to a coin based on the base currency.

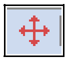
The upsell functionality is specific to PeopleSoft Support.



Click the Asset Summary button to launch an asset management application, which passes the desired asset information to the application for reporting.



Click the Remote Control button to launch a remote control process that enables an IT agent to remotely query for data from an installed product or asset or to run a process to remotely take control of an employee's computer.



Click the Map Dashboard button to access the Map Dashboard page and view the map and tabular data generated for the currently opened case. This functionality is available only when Environment Service Research Institute (ESRI) is installed.

Note. Users must specify a business unit, setID, and market on the Overall Preferences page under Set Up CRM, Security, User Preferences in order to access the map dashboard.

Click the CTI Dialout button to launch the Outbound Call page to enable a user to direct the CTI console to dial a telephone number displayed on that page. Outbound calling works only when the CTI console is enabled and the user has registered with the CTI vendor.

Click the View Worklist button to launch the My Worklist page. The agent uses the Worklist page to efficiently manage personal work tasks and responsibilities.

Note. You must set up this button on the Toolbar Definitions pages during setup.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Configuring Toolbars."

History

Select a value and click the green arrow to return to the selected page. This field appears if you access the Case page through a page other than the Case Search page.

Current user time

Displays the time that you opened the component. This field is informational only; it is not saved with the case.

Time zone

Select the time zone in which to display the times on the page. Values are:

My Time Zone: The current user's local time zone.

Customer (PeopleSoft Support only): The time zone that is associated with the caller.

Employee (PeopleSoft HelpDesk and HelpDesk for Human Resources only): The time zone that is associated with the caller.

Assigned: The time zone of the agent who is currently assigned to the case.

Previously Assigned: The time zone of the agent who was previously assigned to the case.

See Also

Chapter 11, "Processing Cases," Reviewing Case History, page 315

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Sending Manual Notifications"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Toolbars"

Background Processing

This section discusses case processing that is transparent to the end user.

Active Analytics Framework (AAF)

PeopleSoft AAF is a suite of tools comprising a closed-loop decision-making system where you can address specific business issues. Applications can respond when certain conditions are met and certain actions are recommended.

Actions include giving a priority service or a better discount for high-value customers, identifying fraudulent transactions, and displaying alerts and warning messages.

At runtime, applications send requests to the AAF decision engine to evaluate all of the policies pertaining to a trigger point. For policies whose conditions are evaluated as true, the system invokes their associated actions.

Your organization can set up AAF policies to trigger various actions under specified conditions. The AAF decision engine can perform several actions that are transparent to the person who triggers the action.

AAF policies can:

- Send general-purpose notifications.
- Send notifications related to entitlements.

  Agreement lines provide customers with specific entitlements such as guaranteed response times and recovery times. Each entitlement can be associated with a workflow rule that sends a notification at a predetermined time. Typically, the notification informs you of an impending deadline.
- Track consumption of prepaid cases under an agreement line that covers a specific number of prepaid cases (PeopleSoft Support only).
- Cascade the case status and resolution information to child cases.
- Send notifications to agents and managers when a case is escalated.

  When a user clicks the Escalate Case button on the Case page, the system displays a message. If the user clicks OK, the system saves the case and sets off one of these trigger points in AAF: *When a Support Case is Escalated* or *When a Help Desk Case is Escalated.*

The AAF decision engine also triggers these actions, whose effects are visible in the case where they are triggered:

- Suggest an action.
- Display alert messages as well as cross-sell and upsell notifications.
- Recommend a solution or a product in an upsell or cross-sell situation.
- Log entries in the Events tab of the Case History page.
- Log entries in the Events tab of the Product History page of an installed product, service, or asset.
- Log entries in the Events tab of the Change Request History page.

- Instantiate a business project.
- Update information on a Case page.
- Display a new page from a link (not available for self-service cases.)
- Display the Upsell button in the toolbar.
- Set the display template ID.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Interactions

Interactions are records of communication between you and your customers. Interactions can be related to transactional objects such as cases, service orders, and so on. Related transactions are considered subinteractions.

You don't need to set up workflow to capture interactions. The system captures them automatically based on certain actions that you perform.

The system records inbound interactions for a case when:

- You create or access a case from the 360-Degree View page.
- You create or access a case through the CTI system.
- A customer or employee uses self-service pages to access, update, or add a case.

The system records outbound interactions for a case when:

- You create correspondence for a case.

  Note. When an agent sends an email from a case to an employee, the system creates an interaction only if the employee is the customer, contact, or alternate contact for the case.

- You create notifications for a case.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Understanding AAF

Searching for Existing Cases

This section discusses:

- General information on searching for existing cases.
- Basic and advanced searches.

- Searches.
- Search criteria for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education.
- Search criteria for PeopleSoft Support only.
- Search Criteria specific to PeopleSoft Support and Service Center for Higher Education
- Search criteria specific to PeopleSoft HelpDesk and HelpDesk for Human Resources.
- Search criteria specific to PeopleSoft HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education
- Search criteria specific to PeopleSoft HelpDesk for Human Resources.
- Search criteria specific to PeopleSoft Service Center for Higher Education
- Search commands.
- Search results.
- Search strategies.

General Information on Searching for Existing Cases

If the case is secured, the message *Secured* appears instead of the problem summary. This message comes from the message catalog, so that you can easily modify the text.

If you are using the Secure Case functionality, you must first establish a person ID on the User Profiles – ID page (select PeopleTools, Security, User Profiles, User Profiles, ID) for each user and then associate the person ID with an employee ID in the Worker component (select Workforce, Worker, Add Worker). The system uses the person ID to determine whether the user is in the provider group assigned to a secure case. If a user does not have a person ID when they try to access a case, the system displays an error message.

Most search criteria fields correspond to fields on the Case page. However, on the Case page, you must enter valid values, whereas on the Case Search page, you can enter part of the whole value in most fields (depending on what operators are set for a given search field).

Note. The information that is available for searching on the Case Search page is conditional, based on the template that you or your implementation team have assigned to the business unit.

There are a few exceptions:

- You must enter a complete value in these fields: Case (case number), Business Unit, and National ID (PeopleSoft HelpDesk for Human Resources only).

- You can enter partial values in the Customer and Contact fields, but only after you click the Lookup button associated with the field. The system displays the appropriate lookup page, where you can search for and select a customer or contact before attempting the search again.

  Note. If the operator is set to equal (=) then the entry must be an exact match. This is configurable through the Configurable Search Setup pages.

  See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages."

Basic and Advanced Searches

You can use the basic search to perform searches using the most commonly used search fields. Advanced search provides users with a list of less commonly used search fields in addition to the more commonly used search fields available in basic search.

Users can perform Boolean searches using field-level search criteria. The system administrator defines the operators that appear on the Configurable Search Setup page. Users can further refine the list of operators for each field if they are granted permission to personalize their search settings.

The system displays a list of the searchable fields. For each field, you can enter a search operator and the search text.

Note. PeopleSoft does not deliver the *contains* operator because it may cause performance problems. To add it to the list of available operators, use the Configurable Search Setup pages.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages," Configuring Searches.

Searches

Depending on how your implementation team configures the search pages for your system, you may not be able to view all of the fields listed below.

Note. If you do not see a field for which you want to perform a search on the basic search page, click the Advanced Search link. If the field that you are looking for does not appear, click the Personalize Search link. The system displays the Personalize Search Settings page (if the system administrator has made this page available to you). You can use this page to select additional fields to display on the search page. If you still do not see the field that you are looking for, contact your system administrator.

Use Saved Search	Provides access to all saved searches.
Basic Search	Click to display a condensed list of fields from which you can search or add new cases. Basic search displays the most commonly used search fields only. These fields include, for example,Company,Contact, and Site.
Advanced Search	Click to display an expanded list of fields from which you can search or add new cases.

Save Search Criteria Click to save the current search criteria as a saved search (either as a new saved search or as a modification to an existing saved search). Then enter the name of the saved search in the Save Search As field and click Save Search.

Delete Saved Search Click to delete a saved search. Then select the name of the search that you want to delete and click Delete.

Personalize Search Click to configure the search page to your own personal preferences.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages," Personalizing the Search Page.

Note. In the sections that follow, not all available search fields are listed: some self-explanatory search fields are not explicitly described .

Search Criteria for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education

The following search fields apply to PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education:

Business Unit Your user preferences determine the default business unit that appears when you open the Case Search page. This field is required when you add new cases and when you search for existing cases. The only exception is that you do not have to enter a business unit if you enter the case ID when searching for an existing case.

Note. To perform a search, the system requires you to enter a business unit and one additional field. If you enter the business unit only, you receive a message instructing you to enter additional search criteria.

When you create a new PeopleSoft Support case, the business unit controls which customers are included in the search domain. Customers are associated with setIDs. You can access those customers in the setID that are associated with the case's business unit only.

When you create a new PeopleSoft HelpDesk and HelpDesk for Human Resources case, the business unit that you specify on the Case Search page does not limit which employees are included in the search domain.

Case Status Enter a case status.

Case Priority Enter a case priority.

Provider Group Enter a provider group. This value will be matched to the provider group currently assigned to the case.

Assigned To Enter an individual. This value will be matched to the agent currently assigned to the case.

Provider Group History Enter a provider group. This value will be matched to any of the provider groups that have been assigned to the case, including the currently assigned group.

Note. As delivered, the Provider Group History search field is configured to appear as part of the Advanced Search set of fields.

Assigned To History Enter an individual. This value will be matched to any of the agents that have been assigned to the case, including the currently assigned agent.

Note. As delivered, the Assigned To History search field is configured to appear as part of the Advanced Search set of fields.

Global Case Selecting *Yes* for this search field will filter the search results to only include cases that have the Global Case flag selected.

Selecting *No* for this search field will filter the search results to only include cases that do not have the Global Case flag selected.

Note. As delivered, the Global Case search field is configured to appear in both the Basic and Advanced Search set of fields.

Search Criteria for PeopleSoft Support Only

This field is specific to PeopleSoft Support:

Customer Enter a customer name. The system searches against all contacts associated with the customer, even if you provide support under an agreement that specifies named callers. Once you're on the Case page, however, you can access the agreement line and verify whether the contact is allowed to report cases.

Search Criteria for PeopleSoft Support and Service Center for Higher Education

These fields are specific to PeopleSoft Support:

PIN (personal identification number) Enter a PIN to identify a customer and a representative. In PeopleSoft Support, this field may also be used on the case to identify an agreement.

SIN (site identification number) Enter a SIN to identify a customer and a site. In PeopleSoft Support, this field may also be used on the case to identify an agreement.

Contact Enter the name of a contact, who acts as a representative for the company, regardless of whether that person is associated with the case in question.

Search Criteria Specific to PeopleSoft HelpDesk and HelpDesk for Human Resources

This field is specific to PeopleSoft HelpDesk, and HelpDesk for Human Resources:

Physical Location	Enter a physical location in the search, if applicable. The Case search page does not limit values for these fields based on the name or employee ID that you enter.

Search Criteria Specific to PeopleSoft HelpDesk, HelpDesk for Human Resources, and Service Center For Higher Education

These fields are specific to PeopleSoft HelpDesk, HelpDesk for Human Resources and Service Center for Higher Education:

Name	Enter the name of a worker or employee who is experiencing the problem.
Department and**Location**	Enter a department or location in the search, if applicable. The Case search page does not limit values for these fields based on the name or employee ID that you enter.

Search Criteria Specific to PeopleSoft HelpDesk for Human Resources

This field is specific to PeopleSoft HelpDesk for Human Resources:

National ID	Enter the national ID of an employee. If the employee has both a national ID and social security number (SSN), the system performs a search on the one that is set as primary. On the Case page, the system changes the label to the ID that is set as primary; either National ID or SSN.

Search Criteria Specific to PeopleSoft Service Center for Higher Education

These fields are specific to PeopleSoft Service Center for Higher Education:

ID	Enter the ID of the individual for whom the case is created.
Campus ID	Enter the ID for the constituent that was assigned by that person's institution and campus.

Search Commands

Here are the search commands that you can use on the Case Search pages:

Search	Click this button (or press ALT + S) to perform a search. The system searches for all possible matches and displays the results in the Search Results grid.
Clear	Click this button (or press ALT + C) to clear data from the search criteria fields.

Search Results

After you perform a search, the system displays information in the Search Results grid. Click any entry in the grid to navigate to the Case page. If you're adding a new case, the system enters the caller information on the Case page.

The fields in the results grid correspond to the search criteria fields. The fields that appear depend on your search criteria. For example, if you searched based on phone number or email address, the Search Results grid displays that information.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences"

Search Strategies

Here are some search tips:

- You can enter partial values in any field except Case, Business Unit, and National ID.

  For example, if you select *begins with* as the operator and then enter *Pleas* in the City field, the search results include a list of all cases with city names that start with *Pleas.*

- You can enter the least amount of data that is needed to limit the search results.

  Entering extra information is time-consuming and increases the likelihood of a typographical error that prevents the system from finding any information.

  For example, if caller *Larry Green* provides his name, you can perform a search using that information without asking for his phone number or email address. If there are multiple *Larry Greens,* you can select one of the *Larry Greens* from the search results.

- A case number uniquely identifies a case. Searching for existing cases by case number displays the Case page (this involves the fewest keystrokes).

- A search is not case-sensitive.

Managing Basic Case Information

This section discusses how to:

- Record partner information.
- Record customer and employee information.
- Enter case information.
- Use the actions section.
- Escalate cases.
- Match cases.
- Send notifications.
- View the installed product hierarchy.
- Use entitlement matches.
- Use entitlement defaults.
- Select provider groups.
- Select workers.

Note. The information that is available on the Case page is conditional and is based on the template that you or your implementation team have assigned to the business unit.

Pages Used to Manage Basic Case Information

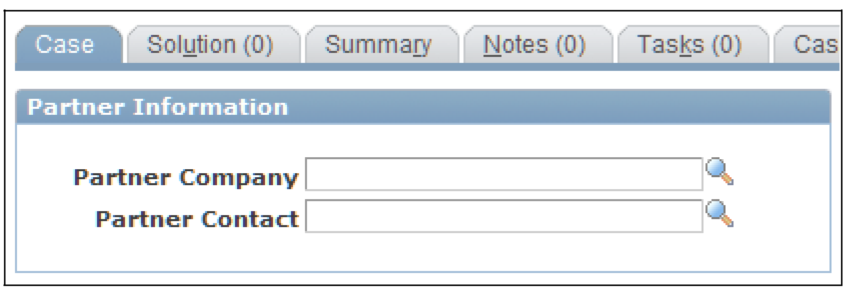
Page Name	*Definition Name*	*Navigation*	*Usage*
Support Case	RC_CASE	• Support, Add Case, Case • Support, Search Cases, Case	Add and manage PeopleSoft Support cases. **Note.** You can also access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education from the 360-Degree View page by selecting *Add Case* from the Actions drop-down list box.
HelpDesk Case	RC_CASE	• HelpDesk, Add Case, Case • HelpDesk, Search Cases, Case	Add and manage PeopleSoft HelpDesk cases.

Page Name	Definition Name	Navigation	Usage
PeopleSoft HelpDesk for Human Resources Case	RC_CASE	• HR HelpDesk, Add Case, Case • HR HelpDesk, Search Cases, Case	Add and manage PeopleSoft HelpDesk for Human Resources cases.
PeopleSoft Service Center for Higher Education Case	RC_CASE	• Analyst Service Center, Add Case, Case • Analyst Service Center, Search Cases, Case	Add and manage PeopleSoft Service Center for Higher Education cases.
Outbound Notification	RB_EM_OB_NOTIFY	Click the Notification button or Set Reminder button on the Case page (or any page with the case toolbar).	Send a manual notification. **Note.** If you have purchased PeopleSoft ERMS, you can use the Notification button on the toolbar to compose new email messages using the Outbound Notification component or respond to existing email using Email Workspace. **Note.** The system automatically populates the contact and interested parties of the case in the recipient list on the Outbound Notification page.
Installed Product Viewable Hierarchy	RF_INSTPROD_VH_SEC	Click the View Product Hierarchy button on the Information section of the Case page.	View the installed products that meet the criteria available on the Case page. For the installed products that the system returns, the page displays parent, child, and sibling relationships to other installed products.
Entitlement Match	RF_ENTL_LIST_SEC	Click the Select Agreement or Warranty link on the Case page.	Select from a list of warranties or agreement lines that may cover the case.
Entitlement Details	RF_VIEW_ENTL_SEC	Click the available warranty or agreement line link on the Case page.	View the entitlements associated with a case. This link is available after an agent selects an agreement line or a warranty.

Page Name	Definition Name	Navigation	Usage
Provider Group Summary	RF_ASSIGN_PG_SEC	Click the Suggest a Provider Group button on the Case page.	Select a provider group from the search result that can be assigned to the case. Groups are ranked by their fit score, an evaluation of how well each group matched the case criteria.
Candidate Summary	RF_ASSIGN_LIST_SEC	Click the Suggest an Agent button on the Case page.	Select a worker from the search result that can be assigned to the case. Candidates are ranked by their fit score, an evaluation of how well each candidate matched the case criteria.
Match Results	RC_MATCH_RSLT_SEC	Click the Match Cases button on the Case, Solution, Summary, Notes, Tasks, Case History, Related Actions, Related Cases, or Interested Parties page.	View a list of matching cases based on the Case Match Definition. Where appropriate, select a related case from the match results set. When selected, the case will appear in the Related Cases grid.

Recording Partner Information

Access the Partner Information section on the Case page.



Partner Information section on the Case page

Depending on the display template, this section may be hidden. Modify the display template if you want the Partner Information section visible on the Case page. If you have purchased PeopleSoft Enterprise PRM for Service, the display template contains partner section and field options, which are delivered disabled. The two display layout options for this group box are within the Case Information section or as its own section on the Case page.

Note. To enable the Partner section, you must purchase PeopleSoft Partner Relationship Management.

Partner Company Displays the partner who is related to the case.

Partner Contact

Displays the contact person for this case.

Note. The contact must have a currently active relationship with the company to be valid.

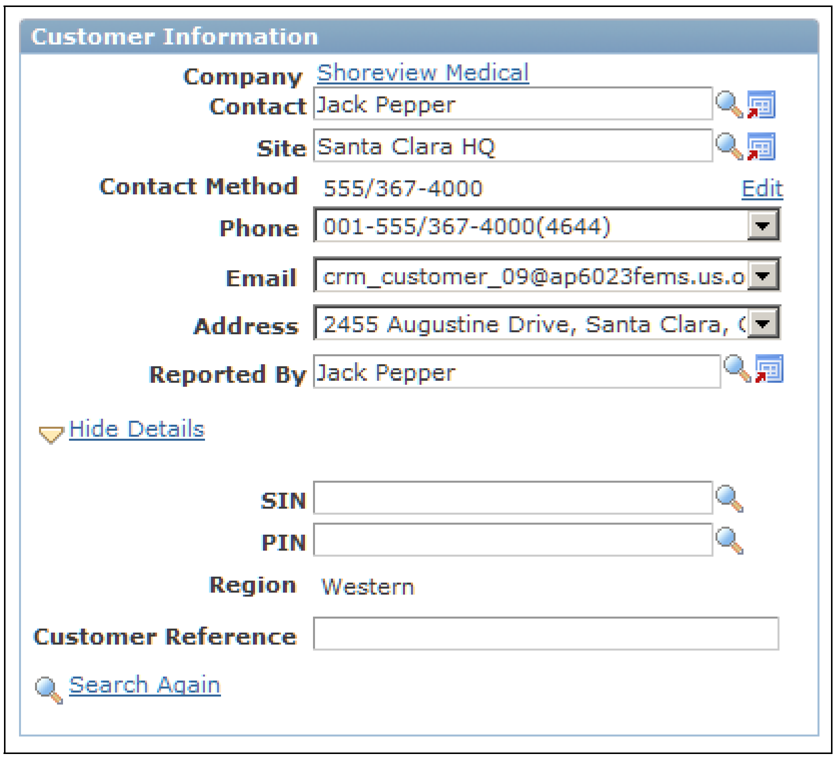
Recording Customer and Employee Information

Access the Customer section on the Case page in PeopleSoft Support and HelpDesk.

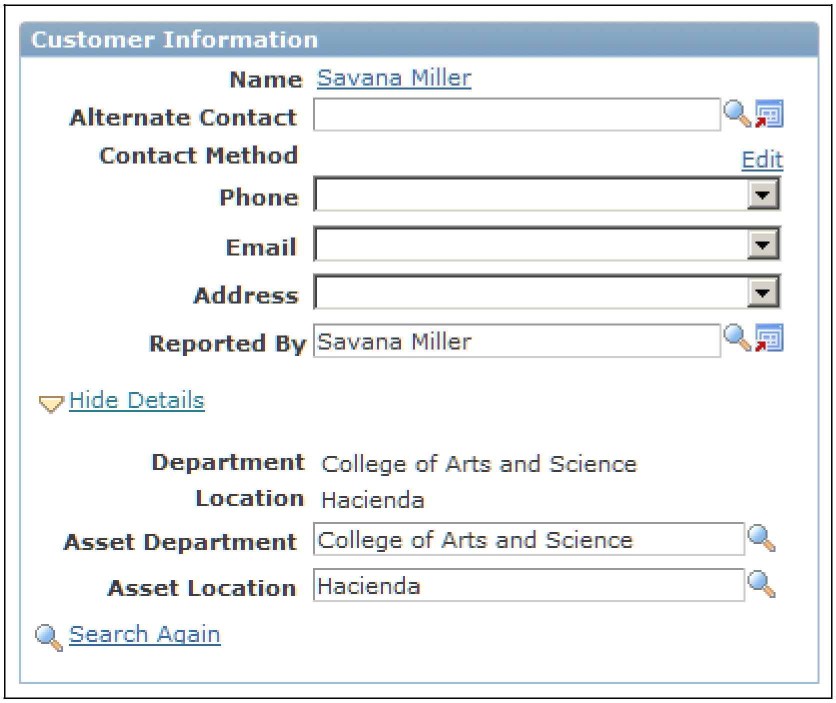
Customer Information

In PeopleSoft Support cases, this group box displays information about the customer who reported the problem. In HelpDesk and HelpDesk for Human Resources cases, this group box displays employee information. In Service Center for Higher Education, this group box displays a combination of these types of information, since such a case can be created for a company contact, consumer, or employee.

Select the Show Details link to see more information about the customer.



Customer Information (Show Details) section on the Case page



Customer Information (Show Details) section on the Service Center for Higher Education Case page

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Note. The visibility of fields in this section depends on the Business Object Search setup, the display template that is used, and how you modify the display template.

These fields are used by PeopleSoft Support:

Customer

Displays the customer (company or consumer) who reported the case.

Contact

Displays the contact person for this case. If the customer is a company, this is a person acting on the company's behalf. If the customer is a consumer, this is someone acting on the consumer's behalf.

Note. The contact must have a currently active relationship with the company to be valid.

If a consumer does not have a contact, this field is blank on the Case page. However, the search results grid on the Case Search page shows the consumer name in both the customer and contact columns.

Contact Method and **Edit**

Click Edit to enter the preferred method for contacting the caller.

Reported By

Select the person who is reporting the problem.

Site

Displays the customer site that is associated with the case. Initially, the system uses the contact's site (for this customer) as the default value. If this site doesn't exist or isn't unique, the system uses the customer's site (if unique) as the default value. The site is validated against the SIN and the Installed Product fields for the case. If you select a SIN or a product, the system enters the site that is associated with that SIN or product. If you select a site for which the current SIN or product is invalid, the system clears the SIN or product information.

SIN(site identification number)

Displays the site identification number (SIN), which is generated for each valid site on an agreement line when the agreement line is created. The SIN identifies the agreement line, the site, and the customer, but not the contact. If you enter a SIN, you cannot also enter a PIN (personal identification number).

When you select a SIN, the system enters the associated site in the Site field. If the product is not valid for the SIN, the system clears the Product field.

PIN (personal identification number)

Enter a PIN to identify a customer, a representative, and an agreement.

Region

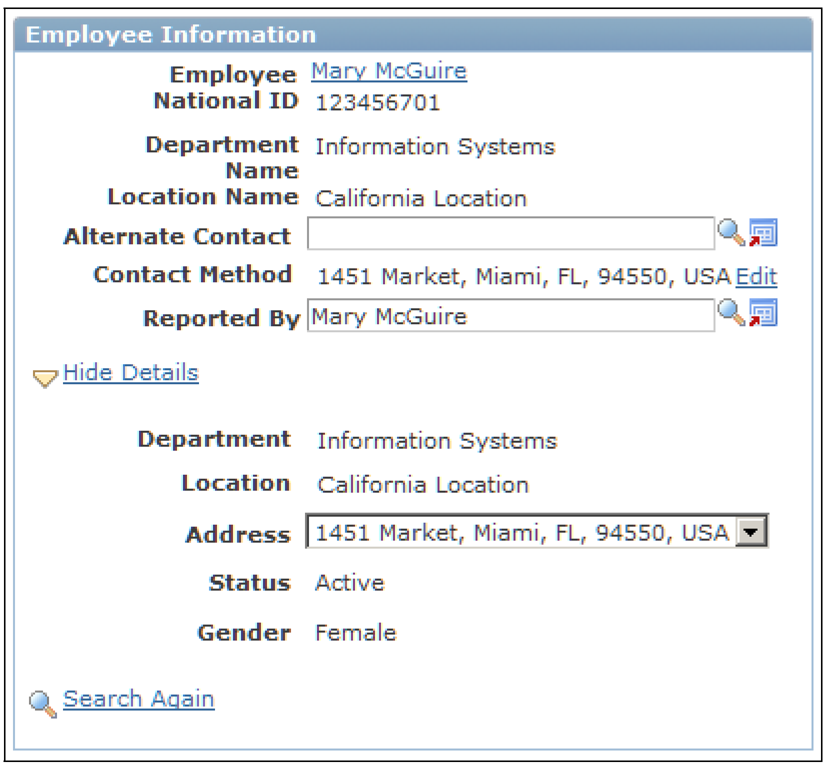
Displays the region that is associated with the default address.

Customer Reference

Enter the reference number provided by the customer, if available. This number is used for the customer's internal tracking purposes.

Employee Information

Access the Employee Information section on the Case page in PeopleSoft HelpDesk for Human Resources.



Employee Information section

In PeopleSoft HelpDesk cases, the Employee Information group box displays information about the employee who reported the problem.

Note. The visibility of the fields in this section is dependent on the display template that is used and how you modify the display template. If an agent has access to view secured data, the system displays information for the Contact Method, Edit, Phone, Email, Address, Status, and Gender fields. Secured worker information is home phone number, home email address, and home address. If the agent does not have access to view secured data, the system hides the data for these fields and the agent can only view data that is not secured.

These fields are used by PeopleSoft HelpDesk and HelpDesk for Human Resources:

Employee

Displays the worker who is experiencing the problem.

Click the name of the person to go to the Worker page, where you can change or add address, phone, and email details for the contact.

Note. When you search for an employee, you can use the Employee ID,First Name, and Last Name as search fields. The Employee ID field uses the equals (=) operator. The other two fields use the Begins With operator. The operators are not displayed, so they aren't obvious to the user. You can, however, configure and change the default operator.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions.

National ID

Displays the ID number by which a person is identified nationally. In the U.S., it is the social security number. This field appears in PeopleSoft HelpDesk for Human Resources cases only.

Alternate Contact

Select an alternate contact for a case; for example, an office manager who handles calls for other employees.

Contact Method and **Edit**

Click Edit to enter the preferred method for contacting the caller.

Reported By

Select the person who is reporting the problem.

In the HelpDesk applications, existing agent-facing cases display the manager or employee who reported the problem and the employee name for whom the case was opened in the Employee field. In Service Center for Higher Education any individual may be selected for the Reported By field.

Department, Location, Address, and **Employee Status**

Displays information about the worker who is experiencing the problem.

Note. In the HelpDesk for Human Resources application, the Department and Location fields are display-only. You cannot change the values that the system displays in these fields. In the HelpDesk application, which is customized for IT departments, you can edit the values in the Department and Location fields. The system provides values for the Department and Location fields by default based on the worker information, provided the setID specified for these fields in the worker component matches the setID specified for the appropriate record group for the Case business unit.

Gender	Displays the person's gender, if known. This field appears in PeopleSoft HelpDesk for Human Resources cases only.

Contact Method

Click the Edit link to edit a person's preferred method of contact. A secondary page appears.

Contact Type	Select the address, email, or phone number that you want to use on the Case page. To enter additional contact information that is not in the system, use the drop-down list box. For example, suppose that you need to contact the caller at a hotel phone number. You can enter the phone number here and avoid adding the hotel phone number to the caller's permanent record.
Contact Details	Enter contact information for the contact.
Type	Displays the contact type for existing contact methods associated with this person. If adding a temporary new contact method, the field value defaults to *For This Case Only.*

Note that any emails initiated from a case by AAF will use the contact method associated with the recipient's role, regardless of whether the case has an email contact method with the type *For This Case Only.*

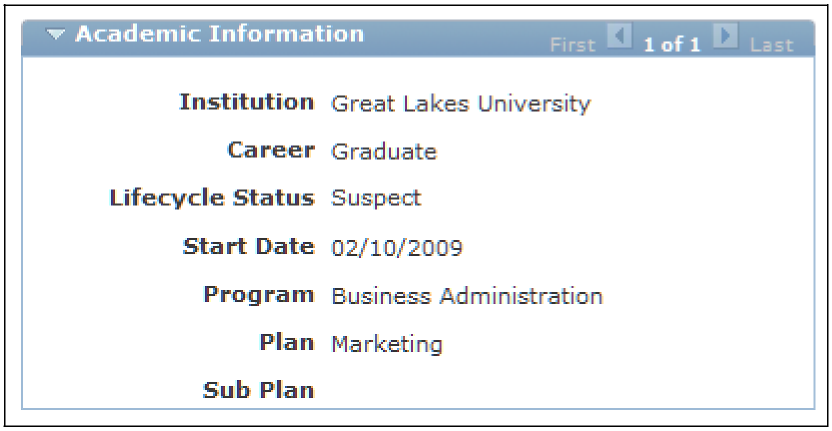
Additional Fields in the Customer Section

Depending on the display template, these fields may or may not be enabled. The Billing and Account fields are available only for these PeopleSoft CRM solutions: Contact Center for Insurance, Contact Center for Communications, Contact Center for Energy, and Contact Center for Banking.

Billing Account	Enter the billing account number.
Account Name	Enter the billing account name.
Account Number	Enter the financial account number.
Account Type	Enter the financial account type.

Academic Information Section

Access the Academic Information section on the Case page in PeopleSoft Service Center for Higher Education.



Academic Information section

After identifying a constituent for a case in PeopleSoft Service Center for Higher Education, an agent will be able to view a display-only summary of the constituent's academic information.

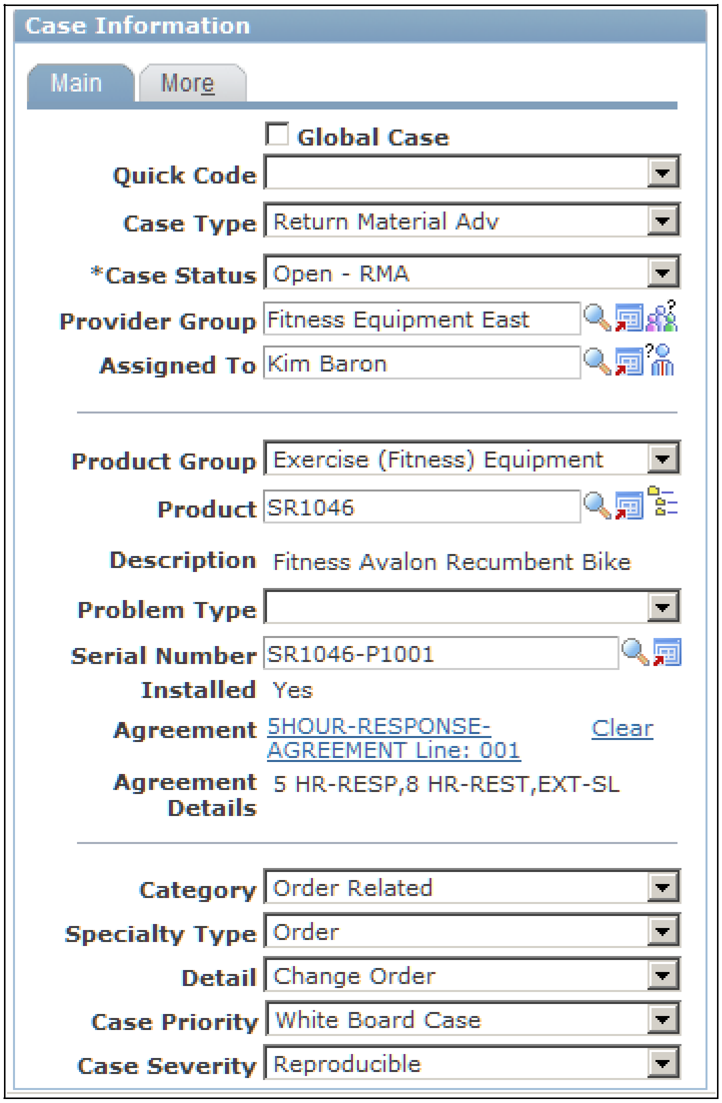
Institution	The academic institution associated with constituent.
Career	The academic career of the constituent.
Lifecycle Status	The program status (not including recruiting status) of the constituent. If the constituent is only a suspect or prospect, this field and the other fields below it will be blank.
Start Date	The start date for the specified combination of institution, career, program, and plan.
Program	The academic program associated with the constituent.
Plan	The plan within the specified program with which the constituent is associated.
Sub Plan	The sub plan within the specified program and plan with which the constituent is associated.

See Also

Chapter 10, "Managing Cases," Case Creation, page 242

Entering Case Information

Access the Case Information section on the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, or Service Center for Higher Education (Support, Add Case, Case or HelpDesk, Add Case, Case or HR HelpDesk, Add Case, Case, or Analyst Service Center, Add Case, Case).



Case Information section: Main tab

Case Information section: More tab

This section contains the Case attribute fields. The fields on the Case Information section are grouped using the Embedded Tabs Section layout. Use the display template to control which fields the system displays on which tabs. Also, display templates control the visibility of fields within the section.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Understanding Assignment Options, page 25.

Enter information about the case in the following fields:

Main

Global Case Select this check box to identify the case as a Global Case.

Quick Code Select a quick code. Depending on your business rules, the quick code you select automatically populates other fields or suggests an action. If the quick code is associated with a display template ID, selecting that quick code will cause the case component to be shown using the associated display template ID.

Note. Cases retain the display template ID with which they were originally created. Therefore subsequent views of the case will be shown using the original display template for that case, not the display template associated with the quick code.

Case Type Select the case type that best describes the part of your organization that is responsible for the problem. For example, a case can be a documentation issue, a service request, or a possible product defect.

Case Subtype Select the case subtype that best describes the kind of case type selected.

Case Status

Select the overall status of the case. Use the different statuses to track the progression of the case. You define specific statuses for your organization.

Provider Group

Select the provider group to which you want to assign the case. For new cases, the default provider group (if any) depends on your business unit configuration.

When a Product Group is specified on a case, the system filters the values for product and installed product to only display the products and installed products contained within the specified product group.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15.

Click the Suggest a Provider Group button to generate a list of suggested provider groups on the Provider Group Summary page. Select one of the suggested provider groups.

Assigned To

Select an agent who belongs to the selected provider group. For new cases, the default assignee depends on your business unit configuration.

You cannot select an agent without first selecting a provider group. The only time that a case is assigned to an agent and not a provider group is when the default assignee is the agent who created the case.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches."

Click the Suggest an Agentbutton to generate a ranked list of qualified, available agents on the Candidate List page, where you can select one of the suggested agents.

You must select a provider group before you can generate a candidate list.

Product Group

Select the product group that requires support.

This field is enabled when you first install your PeopleSoft Support application. It is applicable for all the verticals except HelpDesk for Human Resources and Government.

Product

Select the product that requires support.

Note. The system displays a list of products based on the option that you selected for the Product Prompt field on the Business Unit - Options page. If you selected *All*, you can select a product from the master products table. If you selected *FSI* and you have FSI installed, you can select an FSI-related product from the master FSI products table. If you selected *Installed*, you can select from a list of products that are installed at a specific site.

When you select an installed product, the system enters the associated site in the Site field, and, if the current SIN is not valid for the product, clears the SIN field.

To define a new installed product for this customer, click the Transfer button to access the Installed Products component.

Description

Enter a complete description of the problem that the caller is reporting. If you do not enter a description, the system copies the value of the Summary field into this field.

Problem Type

Select an aspect of the product for which a call center agent might be qualified to resolve the problem. This field is related to the Product field. You must first select a product before the system displays problem type values that you can select.

If the Product field is blank, no values are available. If you use the system's auto-assignment feature, the assignment engine employs the competencies associated with the problem type to help identify the agents who are most qualified to solve the problem.

Serial Number

Enter the serial number of the product that requires support or servicing. If you have selected a product, the system enters the serial number for that product. If you have not selected a product, selecting a serial number enters both the product and the serial number.

If you enter a serial number directly into the Serial Number field when you first access the Case page for PeopleSoft Support and HelpDesk, the system automatically populates the Customer, Contact, Site, and Product fields on the Case page.

Asset Tag

Click to display the Search Installed Assets page, where you can look for installed assets by employee, department, and location.

To display this field on the Case page, access the Display Template page to select the check box for the Asset Tag field.

Installed

If the product that you select is registered to the employee, consumer, or customer on the Installed Products page, it displays here (PeopleSoft Support and HelpDesk only).

Select Agreement or Warranty

Click to search for warranties and agreement lines that might cover the case. This link is available for open cases only.

Warranties are associated with products and are, therefore, found only in the PeopleSoft Support application and only if you've specified a product.

If the entitlement search returns more than one match and if the system displays the results on the Entitlement Match page, you can select a warranty or agreement line, view warranty or agreement line details, and associate a warranty or agreement line with the case.

The system returns agreement lines as search results in entitlement searches for either a product or an installed product. The search attempts to locate either a product or an installed product on the agreement line that matches the product or installed product on the case.

A warranty is returned in an entitlement search only if an installed product is supplied. If the entitlement search finds only one valid warranty or agreement line, the system bypasses the Entitlement Match page and displays the Detail page for the warranty or agreement line that was found.

Once you've associated an agreement line with the case and saved the case, the Search Entitlement button is no longer visible on the Case page for PeopleSoft Support, and the Customer, Contact, Business Unit,PIN, SIN, Site, Product, Serial Number, and Problem Type fields can no longer be modified.

On the PeopleSoft HelpDesk Case page, Business Unit,Employee,Product, and Asset Tag can no longer be modified.

Note. Once the page is saved, you can't modify an agreement line without special administrative-level permission. If you modify the entitlements of an agreement after the agreement is already selected on the case, the new entitlements don't take effect. The PeopleSoft system provides an Application Engine program (RF_AGR_LEAD) to verify the entitlements that are already scheduled at the time the agreement is selected. Select Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal.

Credit Authorization

This link initiates a search of the customer's billing records for a flag indicating whether to accept the customer's payment by credit card.

Priority

Select the priority that classifies the case according to its effect on the caller's ability to continue operations. A problem that stops mission-critical activities has a higher priority than a problem that has a workaround or that inconveniences someone.

Urgency

Select the urgency of the case. As delivered, this field is visible on HelpDesk (but not Support) cases, though this may be changed by your system administrator.

Severity

Select the severity of the case according to its reproducibility.

View Product Hierarchy Click the View Product Hierarchy button to view the installed product records that meet the caller and product criteria already entered on the Case page. The system displays the parent, child, and sibling relationships for the selected installed product records on the Installed Product Viewable Hierarchy page.

In PeopleSoft Support cases, the search is based on the customer, site, product, and serial number that have been entered.

In PeopleSoft HelpDesk cases, the search is based on the worker, department, product, and asset tag that have been entered.

More

View Mode Use this field to manually change the display template that controls the appearance of the information that appears on the page.

Note. This field is delivered as hidden. If you want it to appear on the page, you must select it on the Display Template - Page Definition page.

When you change a display template (using AAF or manually) the system re-renders the entire page, including the toolbar, related actions, and various group boxes that appear on the pages within the Case component.

The View Mode field displays all the display templates for the component, display template family, and selected business unit. The system obtains the list of display templates from the Call Center Definition - Display Templates page. When an agent changes the business unit on the Case page, the system repopulates the display template values that appear in the drop-down list box for the View Mode field.

Warning! The display template that an agent selects using the View Mode field is temporary. This information is not stored in the Case record. Therefore, if an agent selects a display template that is not the default display template and then saves the case and comes back to it, the system displays the Case page with the default display template, not the one that the agent last used to view the case.

Business Unit Displays the business unit that is associated with the case. Business units also control prompting for many other fields in the case. The system displays values that are valid for the business unit only. When you change the business unit, the values in this field are those for which the appropriate vertical (PeopleSoft Support or HelpDesk) is established. The system confirms that these conditions are met before the case is transferred to the business unit that you select:

- The case has no related actions or related cases.
- The current and new business units reference the same setup data (that is, they use the same setID) for these record groups: FS_18 (items), RB_01 (customers), RF_07 (agreements and warranties), and RC_02 through RC_09 (case attributes and AAF).

Visibility

Select the visibility of the case. The options are *Internal*,*External*,and *Internal, exclude Case Contact.*

Select the *Internal, exclude Case Contact*option to prevent self-service users from viewing the case through the self-service application.

Resolved by First Contact

Select to indicate that the agent resolved the case on the first contact with the customer or employee.

Source

Select the communication channel used by the person who originally reported the problem. For example, a person can report a case by telephone, email, or a self-service web page.

Impact

Select from the drop-down list box a value that describes the effect that the problem has on the business processes of the organization.

Asset Tag

Select the asset tag of the installed product that requires support in PeopleSoft HelpDesk. If you entered a product, values are limited to asset tags for the specified product. If you have not entered a product, selecting an asset tag enters both the product and the asset tag.

Installed

Displays *Yes* or *No* in PeopleSoft Support and HelpDesk if the product that you select is registered to the employee, consumer, or customer on the Installed Products page.

Summary

Enter a summary of the problem that the caller is reporting. This field is required. If you do not enter a value, the system uses the first 80 characters of the Description field as the summary. This shortcut helps you avoid retyping the same text into two fields.

Category, Specialty Type, and **Details**

Select category, specialty type, and details for the case. These are hierarchical fields. The category value that you enter limits the specialty type values, and the specialty type value that you enter limits the details values.

Note. These fields can be set up to drive the case assignment process.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Toolbars."

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting up Valid Category, Type and Detail Combinations, page 71.

Additional Fields in the Case Information Section

Use the display template to control the visibility of these fields. You can choose whether these fields appear on the Main tab or the More tab.

Note. The system updates the response met and restore met dates and times for all cases, even if the case does not have an associated agreement with an entitlement.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Secured Case	Select to indicate to the system that the case should only be viewed by individuals associated with the provider group on the case. When you mark a case as secured, you must enter a provider group before you can save the case. Once you secure the case, it is associated with the provider group. Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, that agent will not have access to the secured case.
Anonymous Caller	Select if the caller wants to remain anonymous. No personal information is recorded, and no personal information is required to save the case. If the caller wants to register, clear the Anonymous check box and search for existing customers or use the Quick Create function to create a new customer. **Note.** The Anonymous Caller option requires that an anonymous customer or worker is already set up using the installation options. See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Creating Business Objects by Using the Quick Create Component.
Site without Customer	Select to enable cases to be created for specific sites without a customer. This check box is displayed after the Customer Information is selected. If you plan to use this option, first set up an anonymous customer, since the system assigns the anonymous customer when this option is selected. Note that in the PeopleSoft CRM Energy call center solution, the customer search returns companies, persons, and sites. In this example, you can search for sites and determine if a customer is applicable on the case. For other call center solutions, the customer search returns companies and persons. This setup is configurable through the BO Search setup. Also note that the PeopleSoft CRM Energy solution enables you to create a site without associating a customer. Other solutions require a customer when creating a site.
Remote Case/Issue ID	The unique keys of the case in the third-party system from which the case was passed to PeopleSoft Enterprise Call Center. This option is used to map the case created in CRM to its counterpart stored in a third-party system.
Purchased From	Enter the name of the vendor from whom the customer acquired the product or service that is referenced in the case.
Target Close Date	Enter the desired date of resolution for the problem.

Error Code and **Error Message**	Error codes are relevant for business units that support products that can display error messages, products such as software or electronics. If you enable error code processing, users can access a list of frequently used solutions based on the error code or error message entered for the case. Enter any error code and error message that the caller reports. To fill in the message associated with the error code, click the Validate button. If the error code has not been used before, the system displays the Error Validation page. You can then use this page to search for or create new error codes and messages. By entering error information, you enable the Frequently Used Solutions page to list frequently used solutions according to the error. The system does not restrict you from prompting against known errors.
Response Met	Displays the date and time that the problem was fixed or the service was restored.
Restore Met	Displays the date and time the agent or service person restored service or fixed the problem with the product.
Entitled Response	Displays the date and time that the customer or employee is entitled to a response after they call in a problem.
Actual Response	Displays the date and time that the agent or service person actually responded to the caller's problem.
Entitled Restore	Displays the date and time that the caller is entitled to have their problem or service restored.
Red Restore and **Yellow Restore**	Displays the date and time that the problem or service will turn red or yellow if it is not restored. These fields are used in conjunction with agreements. To use these fields, you must enter a percent in the Percent of SLA for Red and Percent of SLA for Yellow fields on the Business Unit-Options page.
Actual Restore	Displays the date and time that the service or problem was actually fixed or restored.

Survey Score

Displays the score generated by the survey that was sent to the customer. This field does not appear on the page unless you enable it using the Display Template - Page Definition page. You must also sign in as a user that has permission to view this field; otherwise it does not appear on the page.

The Survey Score field uses the RC_VIEW_SURVEY _SCORE functional option code, the RC_VIEW_SURVEY _SCORE _GROUP functional option group code, and the Case Survey Score application security profile to enforce security. The PeopleSoft system delivers the functional option code for the Survey Score field on the Display Template - Page Definition page. It also delivers the Case Survey Score membership list, which is where you can control what roles or users are permitted to view the Survey Score once it is enabled on the Display Template - Page Definition page. For this membership list, the PeopleSoft system delivers the *Call Center Manager* and *Help Desk Manager* roles.

Note. The Survey email is sent to Customer's primary email address. If the customer is a consumer, then the survey email is sent to the consumer's primary email address. If the customer is a company, then the survey email is sent to the contact's primary email address.

On the Case page, an agent can edit the Contact Method field to enter an email with the *For This Case Only* type, which can be different from the customer's primary email. In that scenario, the survey email is still sent to customer's primary email address and not to the email address with the *For This Case Only* type.

Using AAF policies, you can instruct the system to send out a survey when a case is in the Closed - Resolved status. In this type of policy setup, administrators can specify who to notify if an error occurs while sending out a survey. The two options are: Notify a Role and Notify a User. If the notify role option is selected and an error occurs, then all users having the specified role receive an email notification. If the user option is selected, then only that user will receive the email about the error.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Understanding PeopleSoft Enterprise CRM Security.

Escalation Date Time and **Escalation Count**

These fields display the date and time an escalation was initiated and the number of times the case was escalated. These fields are hidden when you first install your call center applications.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," page 51

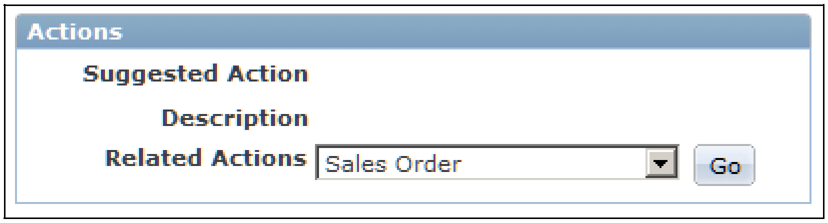
Chapter 10, "Managing Cases," Validating Errors Reported by Callers, page 298

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products"

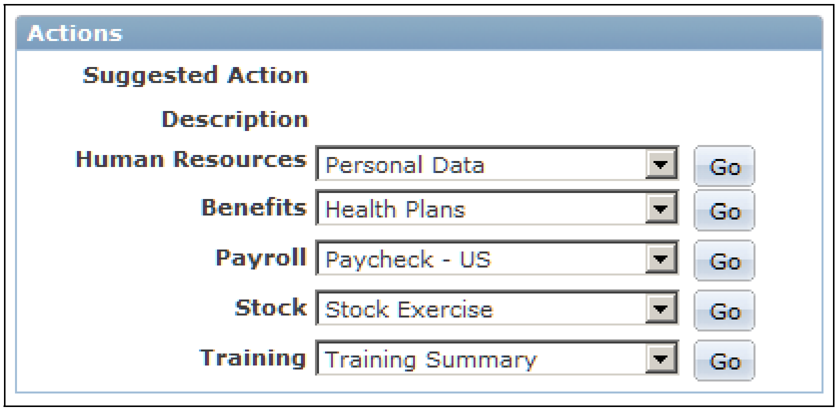
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Business Projects"

Using the Actions Section

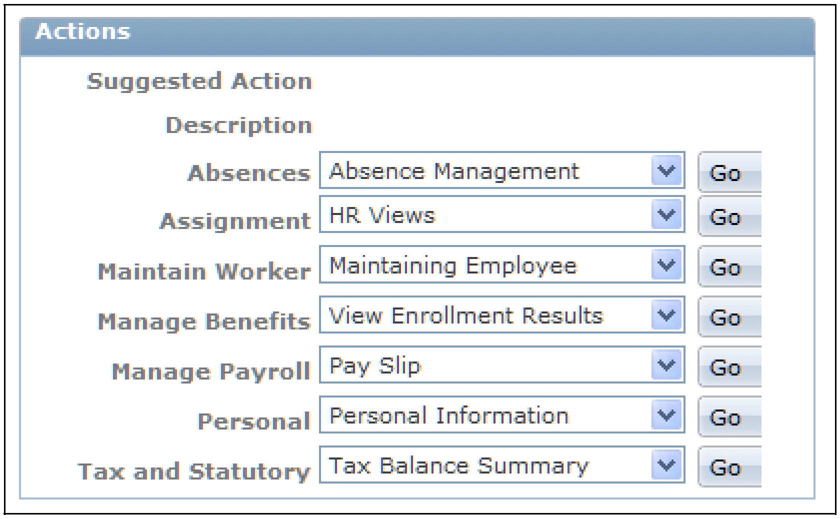
Access the Actions section on the Case page.



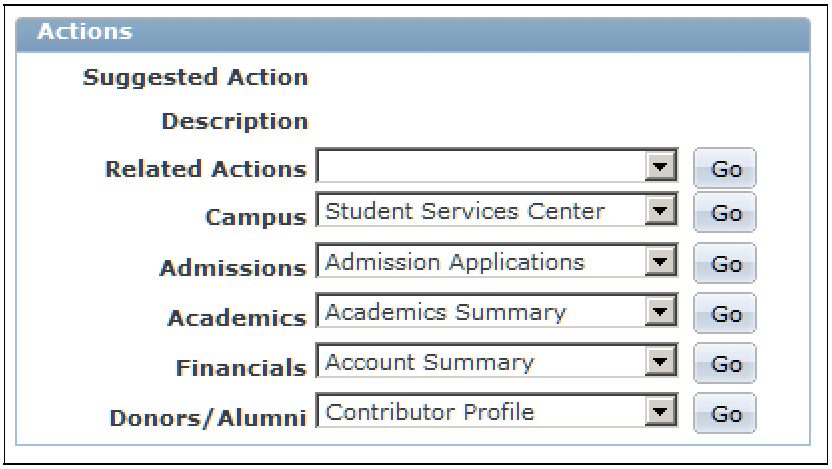
Actions section (PeopleSoft Support and HelpDesk)



Actions section (PeopleSoft HelpDesk for Human Resources)



Actions section (PeopleSoft HelpDesk for Human Resources - E-Business Suite



Actions section (PeopleSoft Service Center for Higher Education)

The Action Link Groups that you or your implementation team set up during installation appear in the Related Actions group box on the Case page. You can set up links in the Related Actions drop-down list box to create service orders and defects and to look for offers and promotions.

When the system loads the items in the Related Actions drop-down list box, it checks to see if the link definition is setID enabled. If it is, then the setID of the link definition is matched with the setID of the case, which is obtained from Case business unit. If the two setIDs do not match, then the system does not populate that link definition in the drop-down list box. When the Case page is loaded and the user changes the business unit, the system reloads the items in the Actions drop-down list box.

In PeopleSoft HelpDesk for Human Resources, you can link to pages in the PeopleSoft or E-Business Human Resources (HR) database (depending on which HR database your system is integrated with).

In PeopleSoft Service Center for Higher Education, you can link to pages in the PeopleSoft Campus Solutions application.

PeopleSoft Support, HelpDesk, and Service Center for Higher Education applications offer the capability to link to predefined actions from the Case page. You can execute actions on the Actions section of the Case Page, the Summary page, or the Related Actions page.

Note that in Service Center for Higher Education, some listed actions may not be applicable for all roles (constituent, company contact, or worker). If an action is attempted for someone who does not have a role that permits that action, an error message will be displayed to inform the user that the action is not available.

See Chapter 11, "Processing Cases," Managing Related Actions, page 333.

The PeopleSoft system delivers these predefined actions:

- *Asset Administrator*
- *Asset Summary*
- *Branch Script*
- *Business Project*
- *Case Survey*
- *Change Request - Create New*

- *Change Request - Relate*
- *Create RMA*
- *Defect - Create New*
- *Defect - Relate Existing*
- *Offer History*
- *Sales Lead*
- *Sales Order*
- *Service Order*
- *Remote Control*
- *Software Delivery*
- *Work Order - Create New*

Note. To create a related action to the Offer Presentation page in PeopleSoft Order Capture, you must set up the link using the Link Group pages. To display the Get Offers or Promotions icon, you must set it up using an AAF policy.

See Chapter 5, "Setting Up Links and Related Actions," page 99.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Suggest Action

The system automatically displays a suggested action that the agent can perform. This suggestion is driven by policies that you set up in AAF.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Suggested Actions for Cases.

Links

The system displays a category name (for example, *Human Resources, Benefits,Related Actions*) for specific links in a category and a Go button.

Depending on the security established for the links that are set up as content references (CREFs), an agent can view all links or a subset of the links. Note that only permission list security definitions from the content reference will be used for determining link visibility. If the user does not have access to any links in a category, the category does not appear.

Go

Click this button after selecting a link in a category to access the corresponding component (specified as a link).

When you click Go, the system:

- Opens a new browser window with the target page (optional).
- Enters the link's long description in the Related Actions section.

Note. The PeopleSoft system includes links to Base Benefits and Benefits Administration enrollment functionality in PeopleSoft Human Resources (PeopleSoft HRMS). Enrollment in medical and FSA (flexible spending accounts) plans under the COBRA (Consolidated Omnibus Budget Reconciliation Act) provisions is carried out in a different manner within PeopleSoft HRMS. To access the enrollment pages for medical and FSA plans under COBRA, log on directly to your PeopleSoft HRMS system.

See *PeopleSoft Enterprise HRMS Application Fundamentals PeopleBook*

See *PeopleSoft Enterprise Benefits Administration PeopleBook*

See Also

Chapter 5, "Setting Up Links and Related Actions," page 99

Chapter 5, "Setting Up Links and Related Actions," Setting Up Content References, page 138

Escalating Cases

Access the Case page.

Use the Escalate Case button to send notifications to agents and managers. If you have associated an AAF trigger point with the button, the system displays a message when a user clicks the Escalate Case button.

Note. The PeopleSoft system does not deliver the Escalate Case button with any associated trigger points. You must use the functionality within AAF to activate this button before you implement your PeopleSoft call center applications.

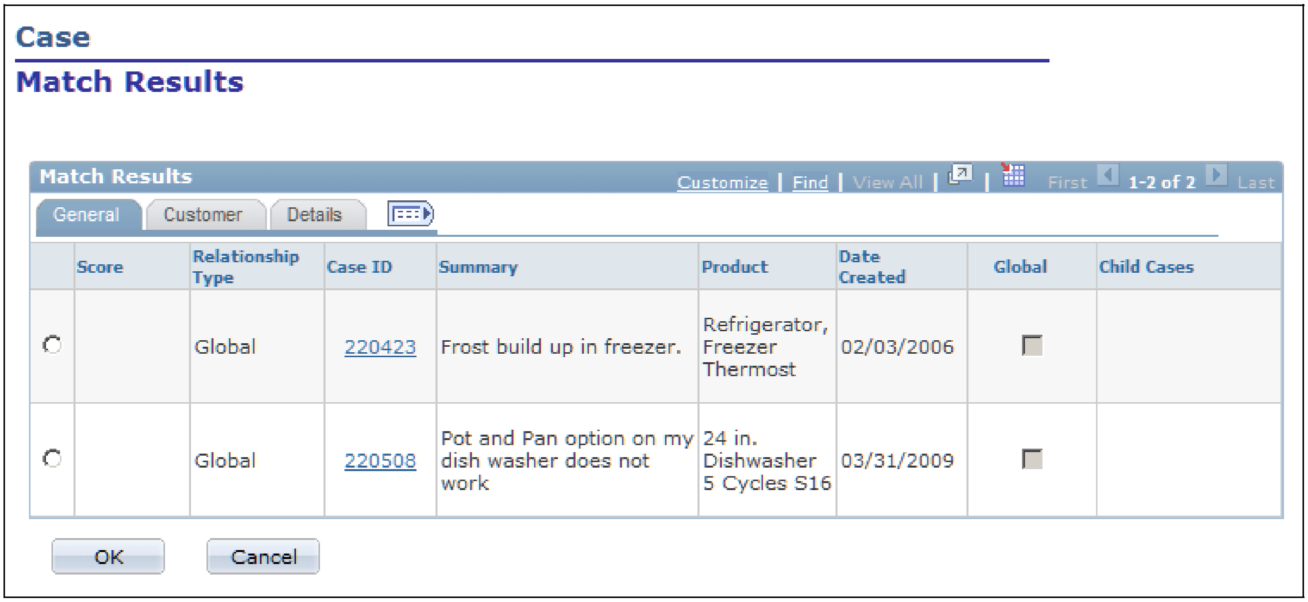
When the user clicks OK, the system increments the escalation count, saves the escalation date and time, saves the case, and sets off one of these trigger points in AAF:

- When a Support Case is Escalated
- When a Help Desk Case is Escalated

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Matching Cases

Access the Match Results page by clicking the Match Cases button on any page in the Case component.



Match Results page

The Match Cases page enables you to see any existing cases that match the current case. This lets you see if the current issue has already been recorded in another case. Any cases that match the current case will be displayed.

Score

Displays a rating between 1 and 100 that represents how closely the entry matches the search criteria. This field is only displayed if keyword searching is enabled.

Note. Keyword searching is enabled or disabled on the Match Detail page.

Relationship Type

Describes the type of relationship that will apply if you associate the case from this grid row with the current case.

Case ID

Identifies cases which match the current case.

Note. Case matching criteria are defined on the Match Detail page.

OK button

Click this button to associate the current case with the case on the selected grid row. The two cases will be associated with the relationship indicated on the selected grid row.

Note that the system will also automatically make the following updates:

- If the relationship type for the selected case has the Set Parent as Global Case check box selected, the system will automatically select and update the Global Case check box for that case.
- If the relationship type for the selected case has the Set Status of Child Using Duplicate Case Status check box selected, the system will automatically update the status of the current case to the Duplicate Case Status defined on Business Unit Case Default page.

Note. If no existing cases meet the match criteria, the Match Results page will be displayed with a message indicating that no matches were found.

If case matching is not enabled for the business unit of the current case, the Match Results page will be displayed with a message indicating that no match criteria have been defined for this business unit.

See Chapter 3, "Setting Up Call Center Prompt Tables," Understanding Call Center Prompt Tables, page 51.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Call Center Business Units, page 28.

Sending Notifications

Access the Outbound Notification page (click the Notification button or Set Reminder button on the Case page (or any page with the case toolbar).

The Outbound Notification page behaves slightly different if the Set Reminder toolbar button is clicked to access the page as opposed to the Notification button:

- The Send and Send and Solve Case toolbar buttons are unavailable.
- The system makes the sender of the notification the TO recipient of the notification.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications," Sending Manual Notifications From CRM Transactions.

Viewing the Installed Product Hierarchy

Access the Installed Product Viewable Hierarchy page (click the View Product Hierarchy button on the Information section of the Case page).

For more information about viewing the installed product hierarchy, refer to the following PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products."

Using Entitlement Matches

Access the Entitlement Match page (click the Select Agreement or Warranty link on the Case page).

For more information about using entitlement matches, refer to the following PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Performing Entitlement Searches for Cases and Service Orders."

Using Entitlement Defaults

Access the Entitlement Details page (click the available warranty or agreement line link on the Case page).

For more information about using entitlement defaults, refer to the following PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties."

Selecting Provider Groups

Access the Provider Group Summary page (click the Suggest a Provider Group button on the Case page).

For more information about selecting provide groups, refer to the following PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up and Performing Assignment Searches."

Selecting Workers

Access the Candidate Summary page (click the Suggest an Agent button on the Case page).

For more information about selecting workers, refer to the following PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook*, "Defining Workers."

Validating Errors Reported by Callers

This section provides an overview of error message validation and discusses how to validate an error.

The Validate button is delivered hidden. If you want to validate errors reported by callers, modify the display template to enable the links.

Error Message Validation

When you support products such as software or electronics that provide users with diagnostic error messages, looking up frequently used solutions using the error message is an efficient way to resolve cases.

You record error information on the Case page. The system does not force you to select from known error messages. Instead, you can enter whatever error information the caller provides. The appearance of this button is activated in the Display Template Details page. If it is activated in the display template, the button appears on the page. If it isn't activated in the display template, then the system does not display it.

When you enter an error code, the system goes through the following process to ensure that a corresponding entry appears in the Error table (ERROR_MESS_TBL):

1. The system checks whether the data that you entered is an unambiguous match for a single known error.

   If a match is found, the system associates the case with the known error.

   An unambiguous match is not necessarily an exact match. For example, if the case does not specify the error code but it has a message that is an exact match for a known message, then the system considers the match an unambiguous match. However, an error code alone is never sufficient for an unambiguous match because different products might use the same code for different purposes.

2. If no unambiguous match is established, you can click the Validate button to access the Error Validation page.

   From this page, you can:

   - Search for similar errors.

     If you find and select an error, the system associates the case with that error. The search is a Verity-based keyword search, so it does not require an exact match—a close match suffices. This search helps you find the error even if you don't type the full text of the error message or if you have typographical errors in your data.

   - Create a new error record using the error code and error message that you entered on the Case page.

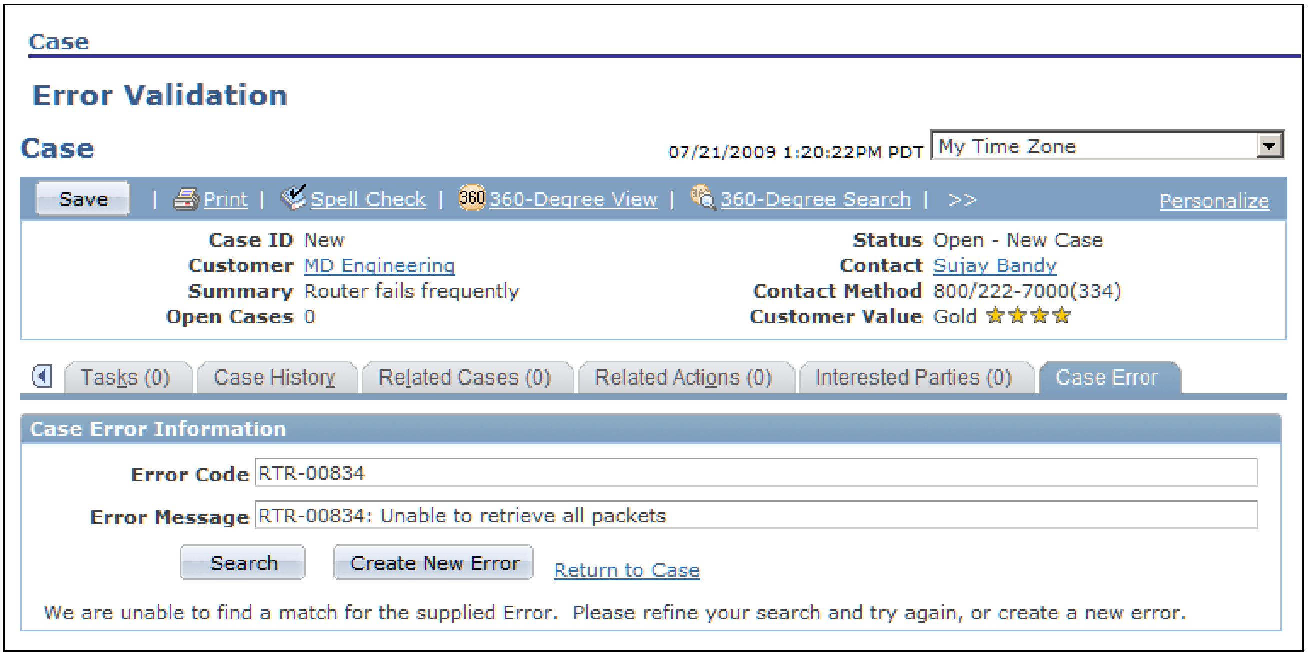
     This process facilitates the process of adding error records to the database. Error records are established as the errors are reported, and you can avoid the initial work of creating records for all possible errors.

Page Used to Validate Errors

Page Name	***Definition Name***	***Navigation***	***Usage***
Error Validation	RC_CASE_ERROR	Click the Validate button within the Case Information group box on the Case page.	Search for existing errors or create new errors. Use this page when an error on a case does not have an unambiguous match in the error table. The error code elements are visible only if you have enabled the error code tracking for the business unit with which you are working. See Chapter 10, "Managing Cases," Entering Case Information, page 281.

Validating an Error

Access the Error Validation page (click the Validate button within the Case Information group box on the Case page).



Error Validation page

Error Code and **Error Message** — Displays the error code and error message that are prepopulated using the data from the Case page.

Search — Click to search for existing errors.

Create New Error — Click to create a new error record using the error code and message on the Error Validation page. If you changed the information on this page, the system updates the error code and message on the Case page to reflect the change.

When you create a new error, the system associates the underlying case with the system-generated ID that is assigned to the error. The presence of an error ID on the case record indicates that the error has been validated.

Return to Case — Click to leave the page without validating the error. As long as the error remains unvalidated, the Validate button on the Case page remains available.

Integrating with Third-Party Asset Management Applications

PeopleSoft HelpDesk gives IT support personnel the ability to pass case information to a third-party asset management application in the performance of asset management tasks. Assets can be any network-connected device, such as a computer, peripheral, or router.

PeopleSoft HelpDesk provides the framework to launch the third-party application from the case toolbar and from the Related Actions sections. PeopleSoft HelpDesk has two toolbar buttons—one for Asset Discovery and one for Remote Control. These buttons launch a third-party asset management application and pass information specific to the case to the third-party applications. The information from the case is passed in the URL. Case information that is passed is typically a person or asset ID, such as employee ID number or the asset tag.

The system captures the date and time when an agent launches the asset management application on the Related Actions page.

To set up case information transfer:

- Set up the link in the Link Definition page.
- Modify the content reference and point it at the Asset Management application installed at your site.

Chapter 11

Processing Cases

This chapter provides overviews of processing a case and solutions and discusses how to:

- Search for solutions.
- View the Case Summary page.
- Add notes and attachments.
- Add tasks to a case.
- Review case history.
- Manage related cases.
- Manage related actions.
- Identify interested parties.
- Record billing information.
- Enter attribute information.
- Select, print, and email case information.

Understanding Processing a Case

You perform some case management activities in the Case component on pages other than the Case page.

Pages that are present in PeopleSoft Support, PeopleSoft Analyst Service Center, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources are illustrated only once. Pages that show customer and contact fields are from PeopleSoft Support. Pages that show employee fields are from PeopleSoft HelpDesk cases.

Understanding Solutions

PeopleSoft ERMS, FieldService, Quality Management, and call center applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

You can search for solutions by clicking the Find Solutions button at the bottom of any page in the Case component, or you can access the Solutions page directly.

See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*, "Using Solutions," Finding and Attempting Solutions.

Viewing the Case Summary Page

The Case Summary page enables users to see all the case information and case activity on a single page.

Modify the display template to control what information and sections you want to be visible on this page. The Case Summary page can consist of these sections:

- Problem
- Case Information
- Notes Summary
- Tasks
- Attempted Solutions
- Related Actions
- Related Cases
- Interested Parties
- Event History
- Billing Information

Note. The PeopleSoft system does not deliver all sections of the Case component as active. You must use the pages within the Display Template component to activate the pages, sections, and fields within the Case component that you want to use to implement your system.

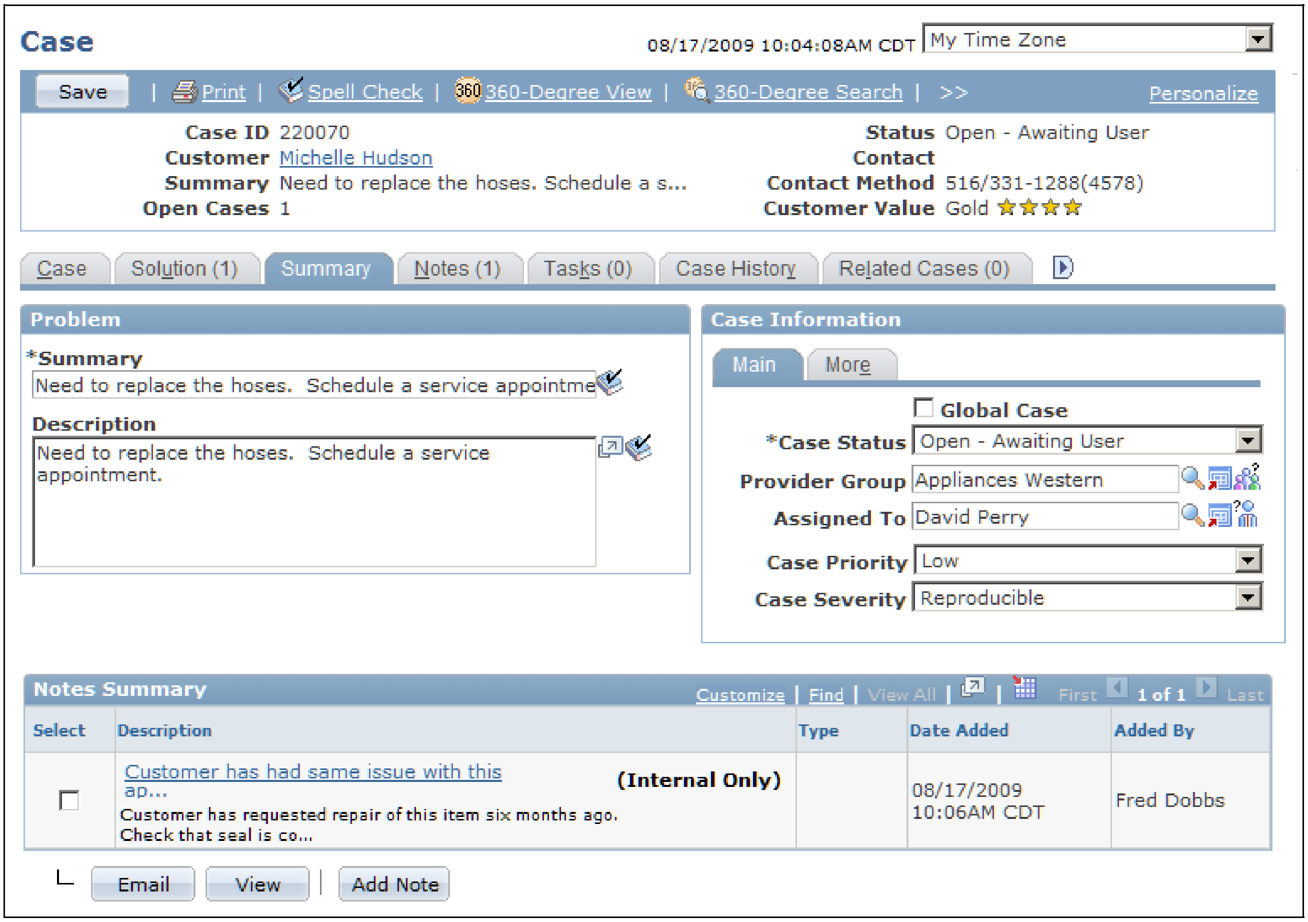
See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Page Used to View the Case Summary Page

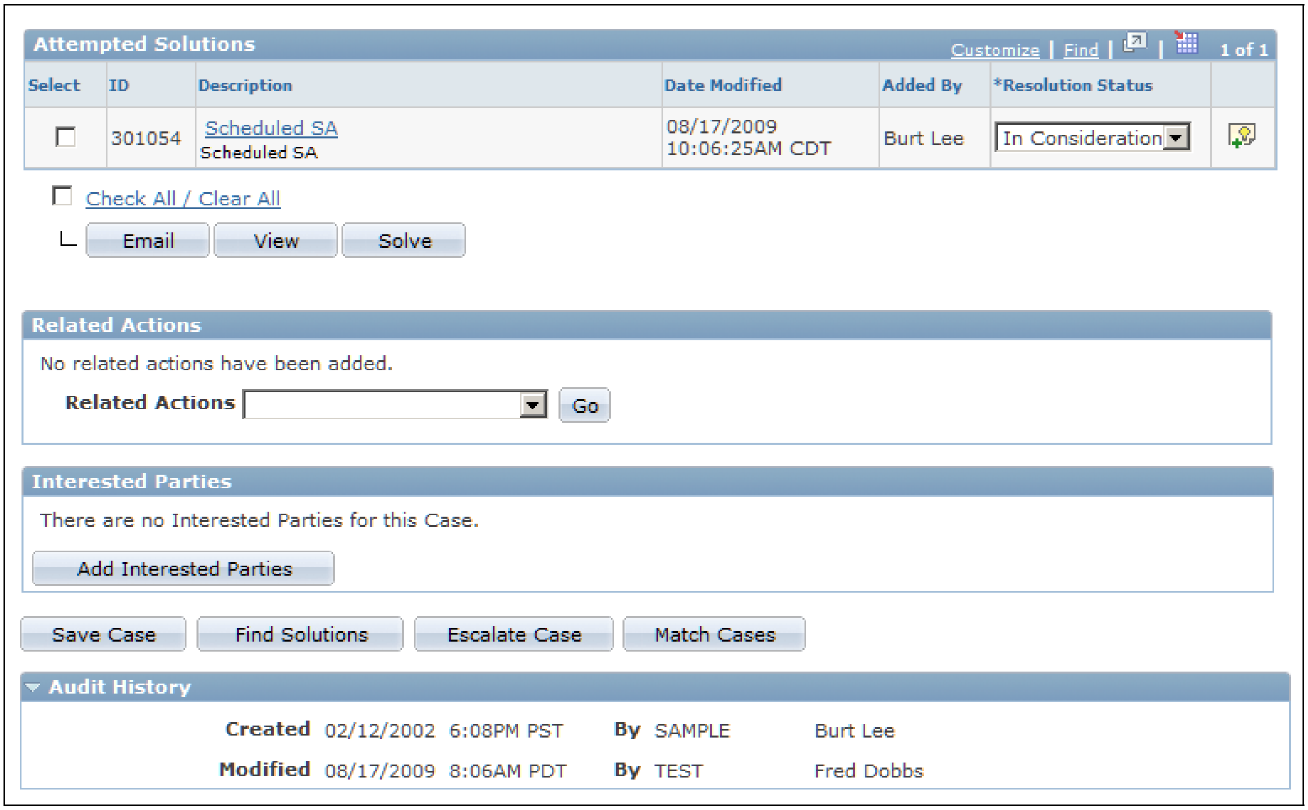
Page Name	Definition Name	Navigation	Usage
Summary	RC_CASE_SUMMARY	• Support, Search Cases, Case, Summary • HelpDesk, Search Cases, Case, Summary • HR HelpDesk, Search Cases, Case, Summary • Analyst Service Center, Search Cases, Case, Summary	View all the case information on a single page. See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Viewing the Summary Page

Access the Summary page (Support, Search Cases, Case, Summary or HelpDesk, Search Cases, Case, Summary or HR HelpDesk, Search Cases, Case, Summary or Analyst Service Center, Search Cases, Case, Summary).



Summary page (1 of 2)



Summary page (2 of 2)

Use the Summary page to view and manage case information from a single page.

Note. The number to the right of the tabs that appear at the top of the page indicates the number of items that appear on that page. For example, if the system displays the number *2* in parentheses on the Notes tab, then two notes are associated with the case.

Adding Notes and Attachments

This section provides an overview of notes and attachments and discusses how to add notes and attachments to a case.

Understanding Notes and Attachments

Recording notes and attaching files to those notes is often essential to a user's work. Notes are the primary method that is used to track case research and communications. If you exchange files with the caller, you need to associate those files with the case.

PeopleSoft CRM provides a standard interface for working with notes and attachments across all the components that require this functionality. On the Case page, you can use text trays and quick keys to auto-fill static and dynamic data to create notes about a case. The Notes page is enabled when delivered.

Note. Once a case is closed, you can add a note on the Notes page by clicking the Add Note button or on the Summary page by clicking the Add Note or Attachment button. You cannot enter a note on the Case page in the Add a Note section.

Adding Case Notes for Inbound and Outbound Email

If the ERMS application is licensed and installed, you can set up the system to automatically add notes to cases when inbound email are received and outbound email are sent for them. When the Add every notification as Note to the Associated Case option is selected, the system adds a note to the case for each email it receives and delivers using the information from the email, as described in this table:

Case Note Field Name	*Field Value*
Subject	<Email subject>
Details	<Email body>
Visibility	*All*
Note Origin	*Inbound*,*Outbound*,*Outbound AAF*,*Outbound Solution*, or *Outbound Notes*
Note Type	*Notification*
Date Added	<Date and time of when the note was created>
Added By	• For inbound email: <PeopleSoft user who started the ERMS processes> • For outbound email sent by an agent: <agent who sent the email> • For outbound email sent by an AAF policy: <agent who triggered the policy on the case>
Customer	For inbound email: <customer who sent the email> For outbound email: <blank>
Contact	• For inbound email: <customer contact who sent the email> • For outbound email: <blank>
Employee	• Note for inbound email: <employee who sent the email> • Note for outbound email: <blank>

Here are a list of scenarios where the system adds a case note when an email is received or sent from a case:

- When an agent creates a case from an inbound email on the Recent Activities tab of the email workspace.

  A case note for the inbound email is added to the new case.

- When a case is created automatically from an inbound email (based on a setup option).

  A case note for the inbound email is added to the new case.

- When an agent associates an existing case to an inbound email from the email workspace.

  A case note for the inbound email is added to the existing case.

- When an agent sends an email response for an inbound email on the email workspace and the inbound email is associated with a case.

  A case note for the outbound email response is added to the case.

- When an agent sends an email response for an inbound email from a case.

  A case note for the outbound email is added to the case.

- When an agent sends an outbound email (not a response) from a case.

  A case note for the outbound email is added to the case.

- When a customer sends an email response (inbound email) for an agent's outbound email that is associated with a case.

  A case note for the inbound email is added to the case.

- When an agent sends one or more solutions by email from a case.

  A case note for the outbound email is added to the case.

- When an agent sends one or more notes by email from a case.

  A case note for the outbound email is added to the case.

- When an AAF policy sends an outbound email from a case based on a triggering event.

  A case note for the outbound email is added to the case.

- When an agent sends a reminder using the Set Reminder feature from a case.

  A case note for the outbound reminder is added to the case.

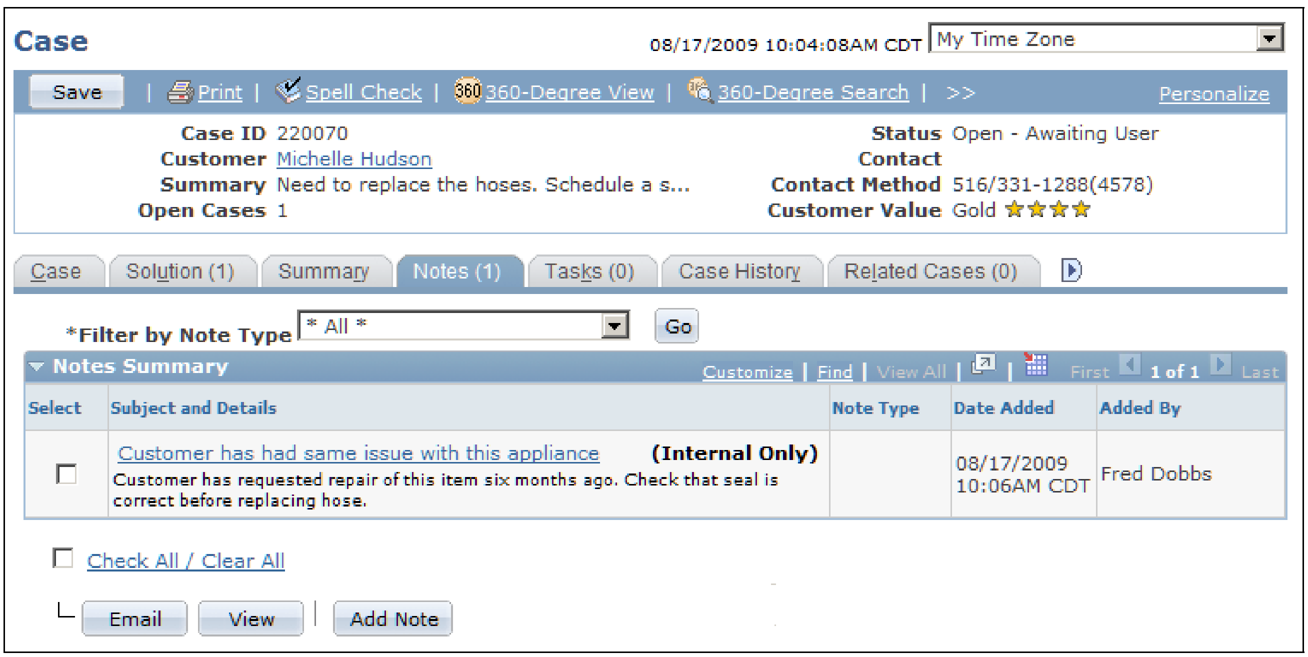
See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Setting Up ERMS System," Defining System Settings for Email Processing.

Page Used to Add Notes and Attachments

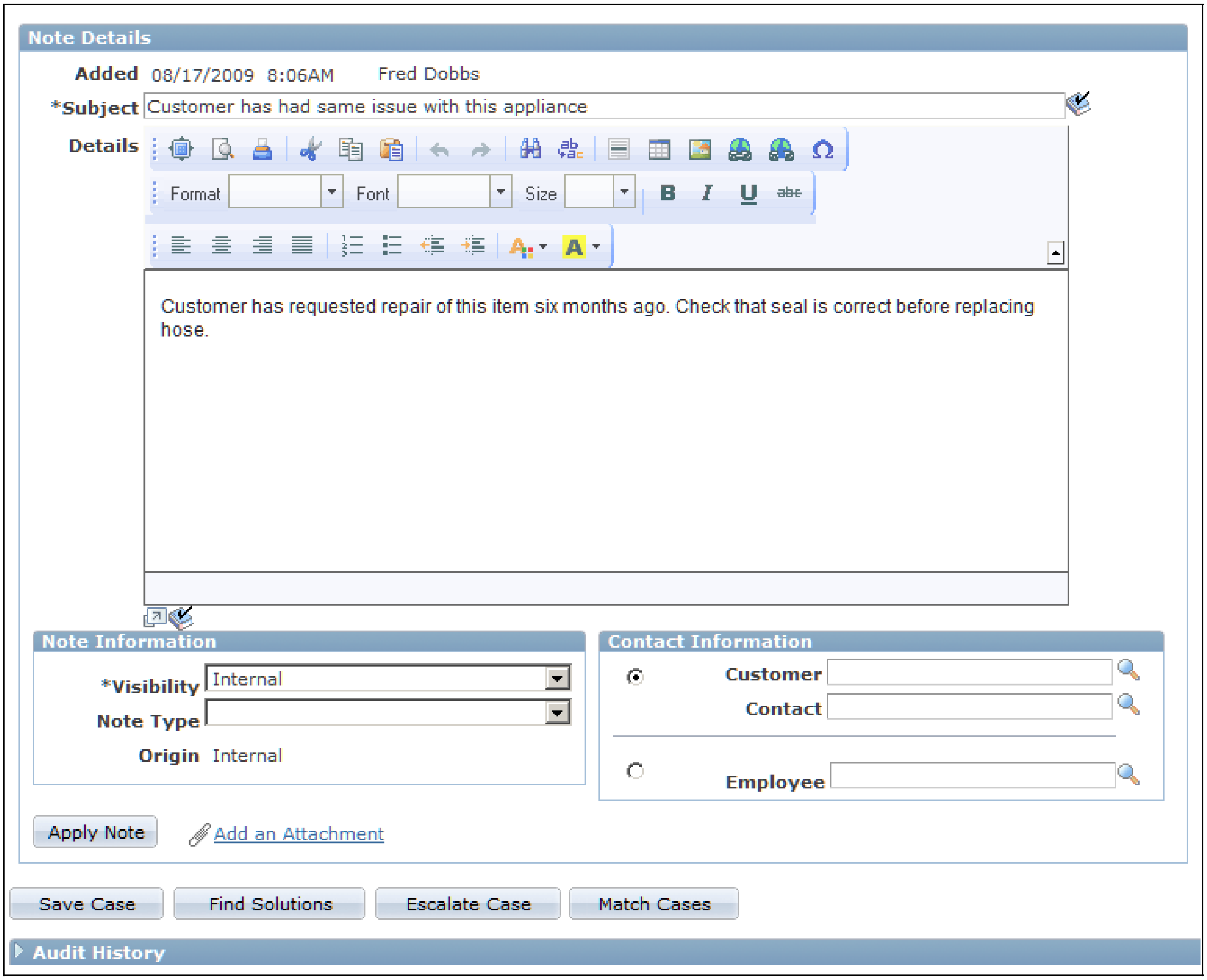
Page Name	*Definition Name*	*Navigation*	*Usage*
Notes	RC_CASE_NOTE	• Support, Search Cases, Case, Notes • HelpDesk, Search Cases, Case, Notes • HR HelpDesk , Search Cases, Case, Notes • Analyst Service Center, Search Cases, Case, Notes	Track notes and attachments that are related to cases.

Adding Notes and Attachments

Access the Notes page (Support, Search Cases, Case, Notes or HelpDesk, Search Cases, Case, Notes or HR HelpDesk, Search Cases, Case, Notes or Analyst Service Center, Search Cases, Case, Notes).



Notes page (1 of 2)



Notes page (2 of 2)

The Notes Summary region of the page includes the following fields:

Filter by Note Type

Select a note type for the system to display notes by the selected note type in the Notes Summary section. Values are:

All (default value)

Comment

Customer Call

Notification

Research

Subject and Details Click the subject link to view and edit details of the note in the Note Details section that appears subsequently on the same page.

These values are not available for edit if the case note is created automatically after sending or receiving a notification.

A paperclip icon after the subject indicates that the note has one or more attachments.

Email Click this button to send an email based on the selected note(s). Any attachments for the note will be available to include with the email.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Sending Manual Notifications."

View Click this button to view details of the selected note(s) displayed as a separate page.

Add Note Click this button to add a note to the case.

The Note Details region of the page includes the following fields:

Subject Enter a summary description of the note.

Details Enter the main information for the note.

Visibility Select *Internal* to limit visibility of the note to internal workers: self-service users will not see this type of note. Select *All* to allow both internal workers and self-service users access to the note.

Note Type See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments," Setting Up Note Types.

Origin Displays the origin of the case note.

- If the note is added manually by an agent, by quick code, or by and AAF policy, the value is *Internal.*
- If the note is added for a self service case, the value is *Self Service.*
- If the note is added for an inbound or outbound email, the value can be *Inbound,Outbound,Outbound AAF,Outbound Solution,* or *Outbound Notes.*

To/From Displays the sender or recipient email address for case notes of type *Notification.* If there are multiple recipients for an outbound email, the first 70 characters of all recipient email addresses will be displayed here.

This information is only applicable to notification-specific case notes.

View Email Click to view the email message that is associated with this case note.

This link appears if the case note is created for an inbound or outbound email that is received or sent for the associated case.

Visibility	Select whether the note is visible to self-service users. Select *All* to show this note to both call center personnel and self-service users; select *Internal* (default value) to hide this note from self-service users.
Contact Information	(optional) Enter the customer contact or employee for whom the note is created.
Add an Attachment	Click this button to attach a file to the note. You will be able to add a description of any attachment that you add. You will also be able to control the visibility of the attachment to hide or display it to self-service users similar to the way that visibility can be controlled for the note.

Agents can use text trays and quick keys to auto-fill static and dynamic data and create notes about a case.

Note. Static data is text that is part of text tray entry, such as "Customer resolved problem on their own." Dynamic data includes tokens that the system dynamically resolves when the entry is used. For example, if you want to include the agent's name in a note, you could create a text tray entry such as "Contact {agent name}." In this example, the text in brackets is the token, and the system substitutes the agent's name when the full text is applied.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

Adding Tasks to a Case

The Tasks page provides call center agents with the ability to assign tasks to themselves or to other agents. Agents can add and update task information either on the Task page or on the Task section on the Case Summary page. They can also add a task or drill down to the Task Details page to create or update task details. Users can also create a task when the case is closed.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

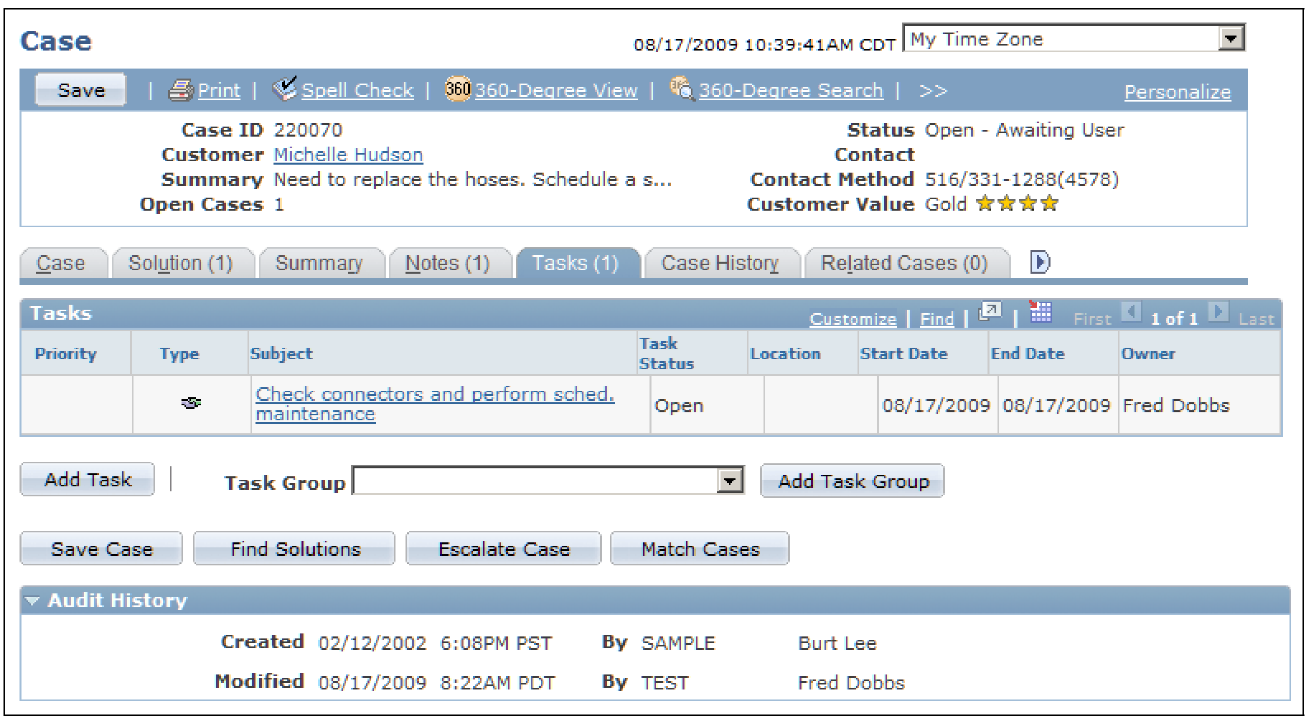
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Tasks," Defining Task Group Templates

Page Used to Add Tasks to a Case

Page Name	***Definition Name***	***Navigation***	***Usage***
Tasks	RC_CASE_TSK	• Support, Search Cases, Case, Tasks • HelpDesk, Search Cases, Case, Tasks • HR HelpDesk , Search Cases, Case, Tasks • Analyst Service Center, Search Cases, Case, Tasks	Add tasks to a case.

Adding Tasks to a Case

Access the Tasks page (Support, Search Cases, Case, Tasks or HelpDesk, Search Cases, Case, Tasks or HR HelpDesk, Search Cases, Case, Tasks or Analyst Service Center, Search Cases, Case, Tasks).



Tasks page

Type

Displays various icons to indicate the type of task that appears. For example, if the task type is *To Do*, the system displays a green box with a check mark.

Subject

Click this link to go to the Task Details page, where you can update task information, add notes, and reassign workers.

Add Task

Click this button to go to the Task Details page to add new tasks to the case and assign workers to the task. Users can also click this button to create a task after the case has been closed.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Tasks."

Task Group

Select a group of tasks to be applied to the case.

Add Task Group

Apply the group of tasks specified in the Task Group field. All the individual tasks from the specified task group template will be added to the case.

Note. The only task templates which will appear in this field are those which have a status of *Active* and which belong to the application usage selected for task templates on the corresponding Display Template ID.

Reviewing Case History

This section provides an overview of case history and discusses how to:

- View the event history of a case.
- View interactions for a case.
- View assignments for a case.
- View the audit trail for a case.

Understanding Case History

The Case History page has these four subtabs:

- Event History page

  Event history provides a summary of the major events in the life cycle of a case.

- Interactions page

  Case interactions are the sum of the events that take place when a customer or worker contacts the organization.

- Assignments page

  This subtab lists all the provider group and agent assignments associated with the case. It also lists the amount of time and percentage of service level consumed by each assignment.

- Audit History page

  Case auditing complements event history processing by providing an automated mechanism for keeping a detailed change history without cluttering the Event History page. Events are configurable.

There is some overlap in the data that these pages capture.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case History Actions.

Event History Page

This page displays information about major events in the life of the case, including a description of the event and details of any field changes that are associated with the event.

AAF policies determines the events that are logged. In addition, each item references the policy name containing the case history action that logged the item. Policies are not active until you set them up.

The Interactions Page and the Audit History pages display information that also appears in the case history table. So, whenever there is an interaction, the system displays it on the Interactions page and in the case history table. The same is true for the Audit History page. Whenever a change is picked up by the Audit history page, the system displays it in the case history table.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case History Actions.

Interactions Page

This page displays the events that occurred when a customer contacted the organization. An interaction is created every time a case is opened or accessed through computer telephony integration (CTI), from the 360-degree view, or in self-service.

The system also creates an interaction when agents send notifications, email, and correspondence. The system logs interactions automatically; so they cannot be turned on and off. An interaction may contain multiple subinteractions.

Assignments Page

This page provides a summary of all the provider group and agent assignments that have been associated to the case. The total elapsed time for each such assignment is displayed so that it is easy to see who has been working on the case and how long they have been working. If the case is associated with an agreement service level and restore time, the percentage of consumed restore time is displayed for each assignment, as well as for the case as a whole.

The percent of service level agreement restore time consumed is calculated as follows:

1. Count the total elapsed minutes from when the assignment was made to when it was changed or to when the case was completed

   (For the current assignment of an active case, count the minutes from making the assignment to clicking on the Assignments page subtab.)

2. Subtract any minutes for which the customer was not entitled to service.

   This is based on the service level and holiday schedule associated with the customer's agreement, as well as any time during which the case may have been on hold.

3. Divide the result by the total entitled restore time (in minutes) and multiply this by 100.

Consider the following example, in which a case was initially created and assigned to the provider group Appliances Western, and then one hour later was assigned to the agent Mason Orellana.

Assigned Date	Provider Group	Assigned To	Elapsed Time	% SLA Consumed	Changed By
08/31/2007 1:45AM PDT	Appliances Western	Mason Orellana	02:00	8	Stu Marx
08/31/2007 12:45AM PDT	Appliances Western		01:00	4	Teresa Pine

Assignments Grid

In this example, the agreement restore time associated to the case is 1500 minutes (25 hours). The percent service level agreement (SLA) restore time consumed for the initial assignment is calculated as follows:

% SLA Consumed = [(Date reassigned) – (Date assigned) – (Non-covered minutes per SLA)] / (Restore time) * 100

% SLA Consumed = [1:45 AM – 12:45 AM – 0] / 1500 * 100 = 4

%SLA Consumed = [60 elapsed minutes – 0 non-covered minutes] / 1500 restore minutes * 100 = 4 percent

If the service level for the case agreement specified that the customer had no coverage from 1:00am to 6:00am, then the percent SLA consumed would be different, since 45 minutes of the elapsed time would not be covered by the service agreement. This would be calculated as follows:

% SLA Consumed = [(Date reassigned) – (Date assigned) – (Non-covered minutes per SLA)] / (Restore time) * 100

% SLA Consumed = [1:45 AM – 12:45 AM – 45] / 1500 * 100 = 1

% SLA Consumed = [60 elapsed minutes – 45 non-covered minutes] / 1500 restore minutes * 100 = 1 percent

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Note. If an agreement is changed on a case that already had an agreement, the percent SLA consumed will be reset to zero for all assignments unless the case is already late. In the event that the case has already missed the SLA and the agreement is changed, the % SLA Consumed values will remain unchanged.

Audit History Page

This page displays record-level changes to case data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). While the system can capture before and after values, no conditional logic exists to evaluate the before and after values of the fields. The system captures all audited actions regardless of the field value. Auditing is delivered disabled.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Auditing for Cases and Inbound Email"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

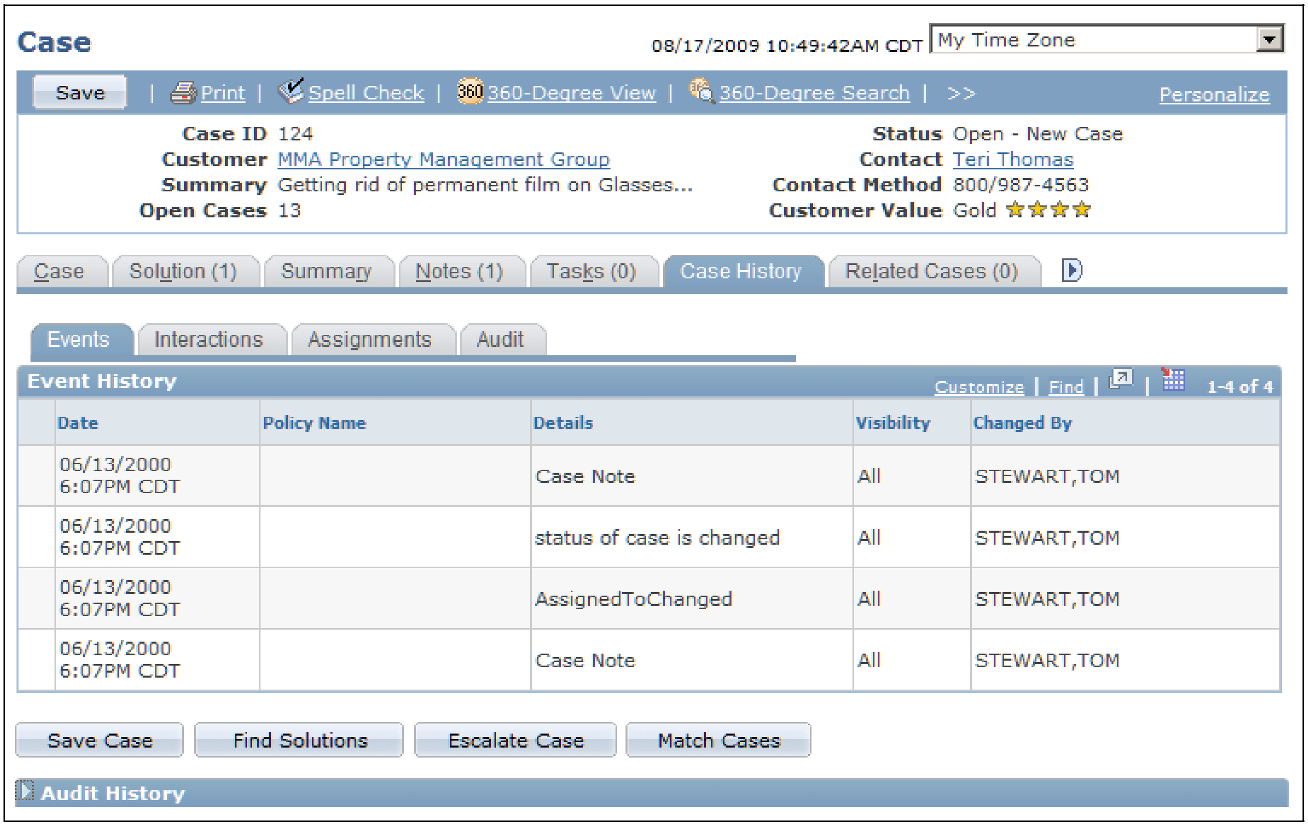
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Interactions"

Pages Used to Review Case History

Page Name	***Definition Name***	***Navigation***	***Usage***
Case History - Events	RC_ACTION_HIST	• Support, Search Cases, Case, Case History • HelpDesk, Search Cases, Case, Case History • HR HelpDesk, Search Cases, Case, Case History • Analyst Service Center, Search Cases, Case, Case History	View a summary of important events in the life cycle of a case.
Case History - Interactions	RC_ACTION_HIST	Click the Interactions tab on the Case History page.	View information about interactions related to the case.
Case History - Assignments	RC_ACTION_HIST	Click the Assignments tab on the Case History page.	View information about case assignments.
Case History - Audit Trail	RC_ACTION_HIST	Click the Audit tab on the Case History page.	View detailed information about changes to specific fields in the case.

Viewing the Event History of a Case

Access the Case History - Events page (Support, Search Cases, Case, Case History or HelpDesk, Search Cases, Case, Case History or HR HelpDesk, Search Cases, Case, Case History or Analyst Service Center, Search Cases, Case, Case History).



Case History - Events page

Note. To populate the Event History grid for adhoc email notifications that are sent from the case, use AAF to create policies. When you create the policy, use the term *Adhoc Email Subject.*

Date The date that the action occurred.

Policy Name The system populates this field with the description of the action from the Event Definition page.

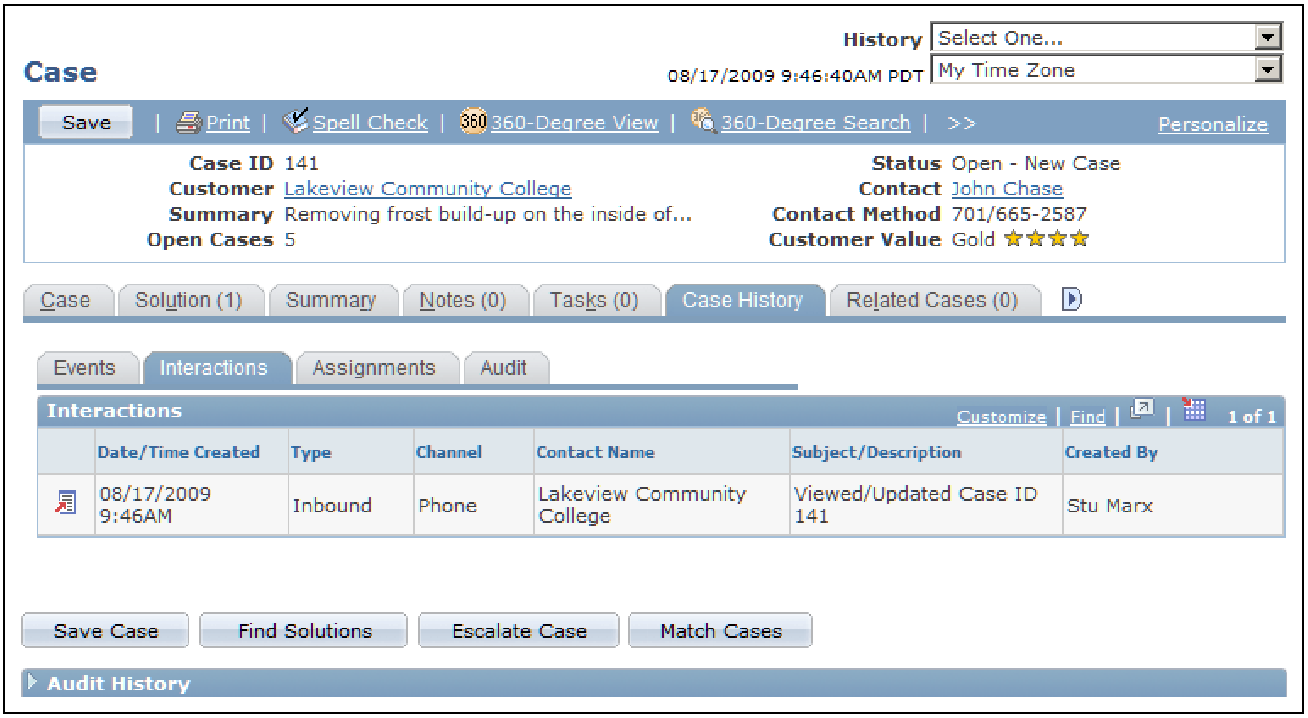
Details Details about the action that was taken. For example, if a case is escalated or the assignment of a case changes.

Visibility The system displays either *All* or *Internal* to indicate who can view the details of the event.

Changed By The name of the agent who initiated the event.

Viewing Interactions for a Case

Access the Case History - Interactions page (click the Interactions tab on the Case History page).



Case History - Interactions page

Date/Time Created The date and time the agent created the interaction.

Type The type of interaction, either *Inbound* or *Outbound.*

Channel The method used to initiate the interaction.

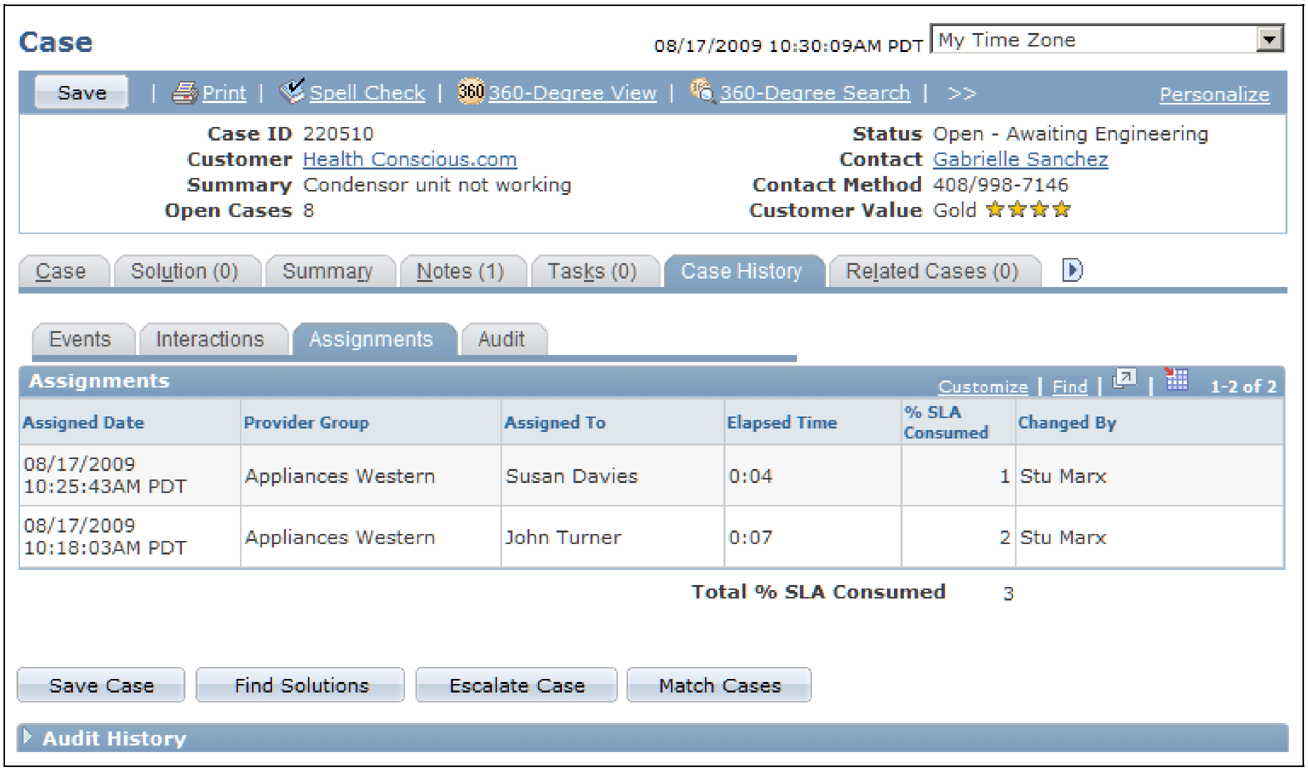
Contact Name The name of the person who was contacted.

Subject/Description The subject or description of the interaction.

Created By The name of the person who created the interaction.

Viewing Assignments for a Case

Access the Case History - Assignments page (click the Assignments tab on the Case History page).



Case History - Assignments page

Assigned Date

The date and time that the assignment was created.

Provider Group

The provider group to which the case was assigned.

Assigned To

The agent to whom the case was assigned.

Elapsed Time

The total hours and minutes that have elapsed for this assignment.

% SLA Consumed

The percentage of the service level agreement restore time that has been consumed during this assignment.

Note. This column will not be displayed if the case is not associated with an agreement service level and restore time.

Changed By

The name of the person who made the assignment.

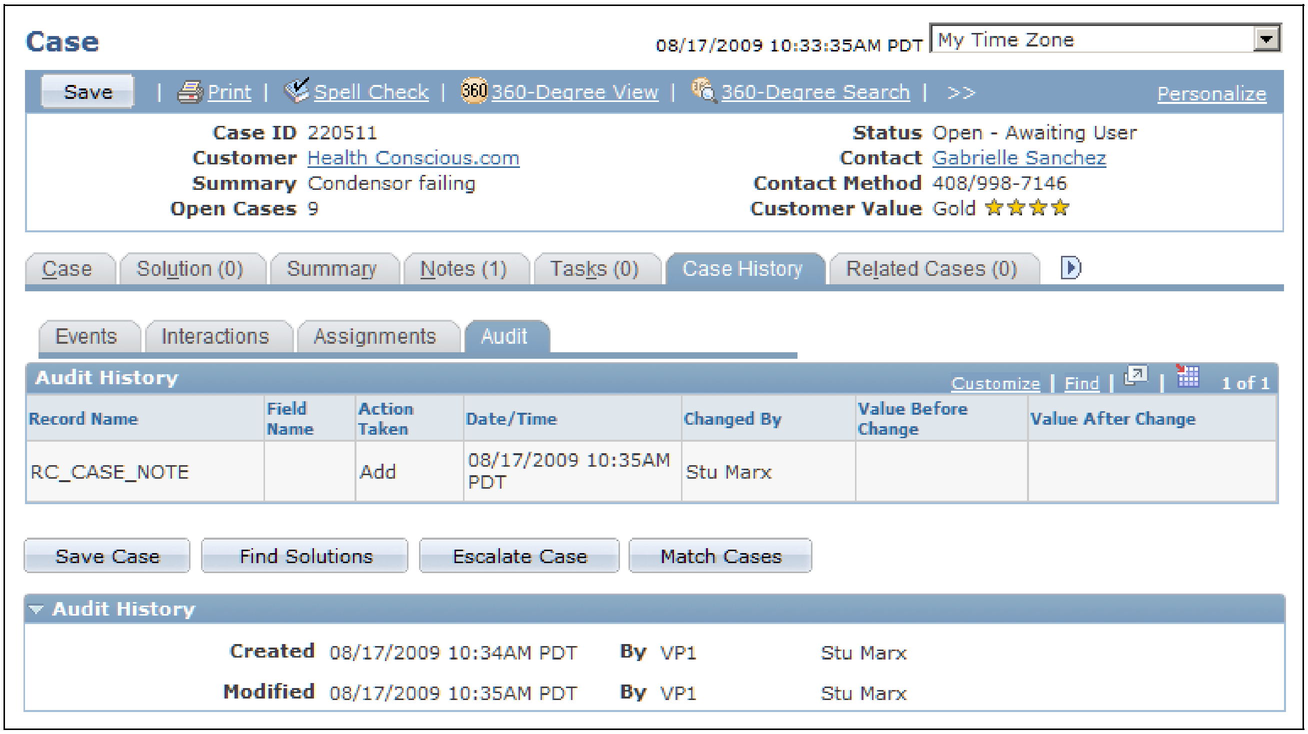
Total % SLA Consumed

The total percentage of the service level agreement restore time consumed for this case.

Note. This field will not be displayed if the case is not associated with an agreement service level and restore time.

Viewing the Audit Trail for a Case

Access the Case History - Audit Trail page (click the Audit tab on the Case History page).



Case History - Audit page

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, changing, or deleting). However, no conditional logic exists to evaluate the before and after values of the field. The system captures all audited actions regardless of the field value. The fields at the top of the columns are self explanatory or similar to the ones explained on the other pages.

Managing Related Cases

This section provides an overview of related cases and discusses how to:

- Review and initiate case relationships.
- Identifying similar cases for which you wish to establish a relationship.
- Specify relationship details when relating a case to an existing case.
- Specify relationship details when creating a new case.

Understanding Related Cases

Users can relate cases to each other for numerous reasons. Your organization establishes valid case relationship types on the Case Relationship Type page. Each relationship is marked as hierarchical or equivalent (non-hierarchical). Each case in a relationship has a relationship label. If the relationship is hierarchical, the parent case and the child case have separate labels. If the relationship is equivalent, only one valid label exists.

When defining hierarchical relationship types, you can select the Set Parent As Global Case option to make the system automatically designate the parent case as a global case as soon as you establish a relationship between that case and a child case.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84.

You can easily search for similar cases from the Case page (using the Match Cases button) or from the 360-Degree View page in order to identify cases that should be related to each other.

The Case Relationships page displays a list of all cases that are related to the current case. Relationships are always reciprocal. If case A is related to case B, then the Related Cases page for both cases reflects the relationship. However, child cases of a common parent do not appear on each other's Related Cases page. Use the Related Cases page of the parent case to see all case relationships at a glance.

Similarly, two cases that are equivalent to a third case do not appear on each other's Related Cases page. That is, the fact that case A is equivalent to both case B and case C does not establish a relationship between case B and case C. To see all equivalent cases in one place, you must make the equivalent cases into children of a common parent.

You can easily choose to make the system cancel any duplicate cases that you identify by associating them with the appropriate original case using a relationship type that has been set to use the option entitled Set status of child case using duplicate case status from the Call Center Business Unit Defaults.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84.

Your organization can also use the AAF Case Relationship action to cascade case statuses. You can write a policy to use this action to cascade statuses from a parent case to all of its child cases.

For example, this is useful if your organization establishes a global relationship type for tracking problems where a single solution (such as rebooting a server) fixes a problem for multiple people. In this situation it may make sense to automatically close all child cases when the parent case is closed. When the status cascades to children, any status-related workflow for the child case is triggered, including cascading statuses to the child case's children.

Note. The Case Relationship policy is delivered inactive in the Case Status Changed policy.

Methods for relating cases are:

- Relate the current case to another existing case.

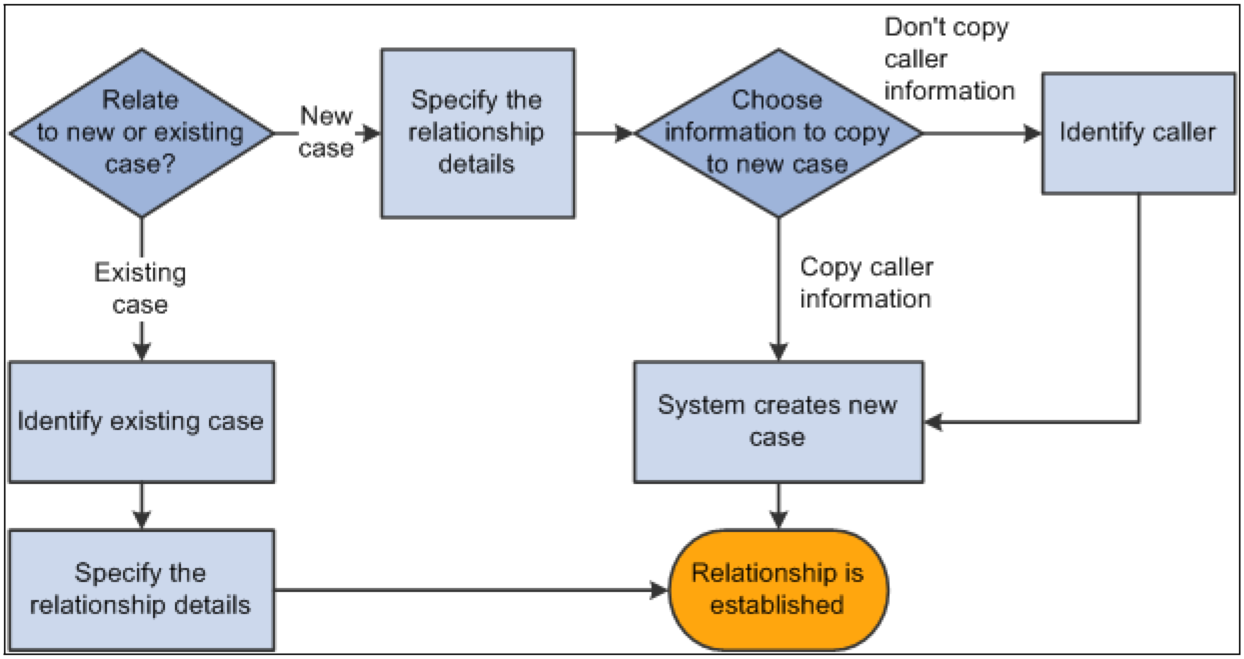
  For example, you receive four calls reporting problems about your web server before you recognize that this is a global problem. The four cases that you've already created need to be related to each other. When you relate the cases, you can choose one as the parent case and make the other three into children or you can make all four of the original cases into children of a new parent case.

- Create a new case and relate it to the current case.

  For example, you've established a global case for your web server problem. Someone calls to report the problem. From the existing global case, you can create a new child case and copy the problem information into the new case.

Note. You can also modify the display template to enable the user to relate a case to a new or an existing case on the Case Summary page.

This diagram illustrates the methods for relating cases, depending on whether the case in question is new or existing:



Methods for relating cases

Identifying Potentially Related Cases

While reviewing or creating a case you can click the Match Cases button on any page of the case component to search for similar cases using predefined match criteria. Once similar cases are found, you can quickly relate the case to one of the similar cases, such as designating it as the related child of a global case or as a duplicate case that is to be cancelled.

See Chapter 10, "Managing Cases," Managing Basic Case Information, page 272.

You can also view potentially related cases for a particular customer or employee by looking at the 360-Degree View. As delivered, the relevant 360-Degree views will contain a folder for global cases with the following nodes:

- *Related:* The Related node displays the global cases for which a related case is already created for the customer or employee. If the global case is for the customer or employee whose 360-Degree View is being displayed, the case will show in the related node

- *Not Related.* The Not Related node displays cases that are not yet related to the customer or employee but which might impact them. It lists existing global cases whose products are the same as those for the installed products of the customer or employee. It also lists global cases that are not associated with any product.
- *View All.* The View All node lists all the global cases from the Related and Not Related nodes.

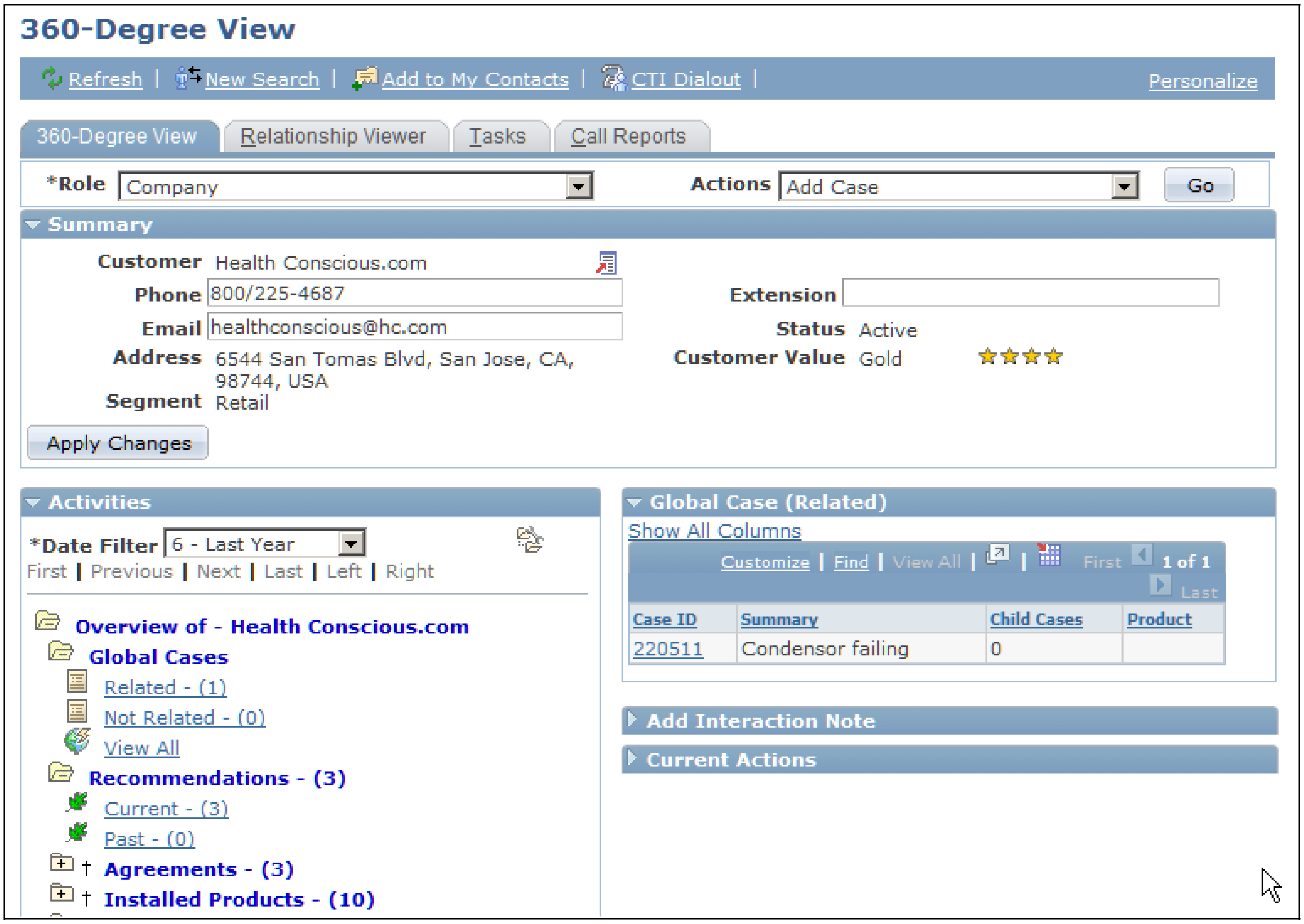
Selecting any of the nodes from the Global Cases folder will populate the related dynamic grid with information about those cases. Use this grid to see information from the list of global cases or transfer to a global case by clicking on its Case ID link.

Note. When the link of a secure global case is selected, you will not be able to access the case unless you are in the provider group assigned to that case. Similarly, for secured cases, the Summary, Product, Case Type, and Incident Location fields will display the word *Secured* instead of the relevant data.

When viewing the Not Related or View All dynamic grids, you can perform a related action on a global case by selecting its row on the grid and choosing the desired action from the Related Actions list. As delivered, the following two actions will be available.

- *Add Child Case:* The Add Child Case action automatically creates a child case and links it to the selected global case. The new case will contain the customer or employee details associated with the current 360-Degree View, and the Problem and Resolution of the global case will be copied over to the new case. If the 360-Degree View has been opened for a company without a contact and the *Add Child Case* action is selected, you will be prompted to search and select the company contact.
- *Add Interested Party:* The Add Interested Party action will add the contact of the customer as an interested party to the global case, and will apply the reason specified from the *Reason Interested* field on the Options page of the Business Unit Call Center Definition setup component. If the 360-Degree View has been opened for a company without a contact and the *Add Interested Party* action is selected, you will be prompted to search and select the company contact.

The Global Cases folder and related dynamic grid on the 360-Degree View is shown here.



360-Degree View page with Global Cases folder expanded

Relating a Case to an Existing Case

To relate a case to an existing case:

1. On the Related Cases page, click the Relate an Existing Case button.

   The Search Cases page appears.

2. Use the Search Cases page to identify the case that you want to associate with the current case.

   Enter search criteria to help you find the case and click the Search button. The system returns a list of cases that match your criteria. To select a case, click that case in the results list. The Relate Existing Case - Relationship page appears.

   If your search criteria uniquely identifies a case, the system bypasses the list of search results and displays the Relate Existing Case - Relationship page.

3. Use the Relate Existing Case - Relationship page to specify the relationship details.

   Specify a relationship type and choose relationship labels for each of the cases. Valid relationship types are defined by your organization and are based on the business unit of the case.

4. Click OK.

   The system establishes the relationship and saves the case. The new case relationship appears on the Related Cases page.

Another way to relate an existing case to another is to click the Match Cases button on any page of the Case component, and select the desired case to relate to the current one from among the displayed results.

See Chapter 10, "Managing Cases," Managing Basic Case Information, page 272.

Creating and Relating a New Case

To create a new case related to the current case:

1. On the Related Cases page, click the Create and Relate a New Case button.

   The Create a New Case - Relationship page appears.

2. Use the Create a New Case - Relationship page to specify the relationship details.

   Specify a relationship type and choose relationship labels for each case. Your organization defines valid relationship types based on the business unit of the case.

3. Select the information to copy from the original case to the new case.

   You can copy the customer or employee information, problem information, and resolution information.

4. Click OK.

   Customer or employee information is required for all cases. Therefore, if you choose to *not* copy caller information, the Create a New Case - Relations page appears so that you can identify the company-contact or the consumer-employee contact for whom you are creating and relating a case.

   Note. Contact information is optional if you are creating a case for a consumer.

   If you choose to copy the caller information, the system immediately creates the new case and returns you to the Related Cases page. The newly established case relationship appears in the Existing Related Cases grid. Select the case link in the Related Cases grid to transfer to the new case.

See Also

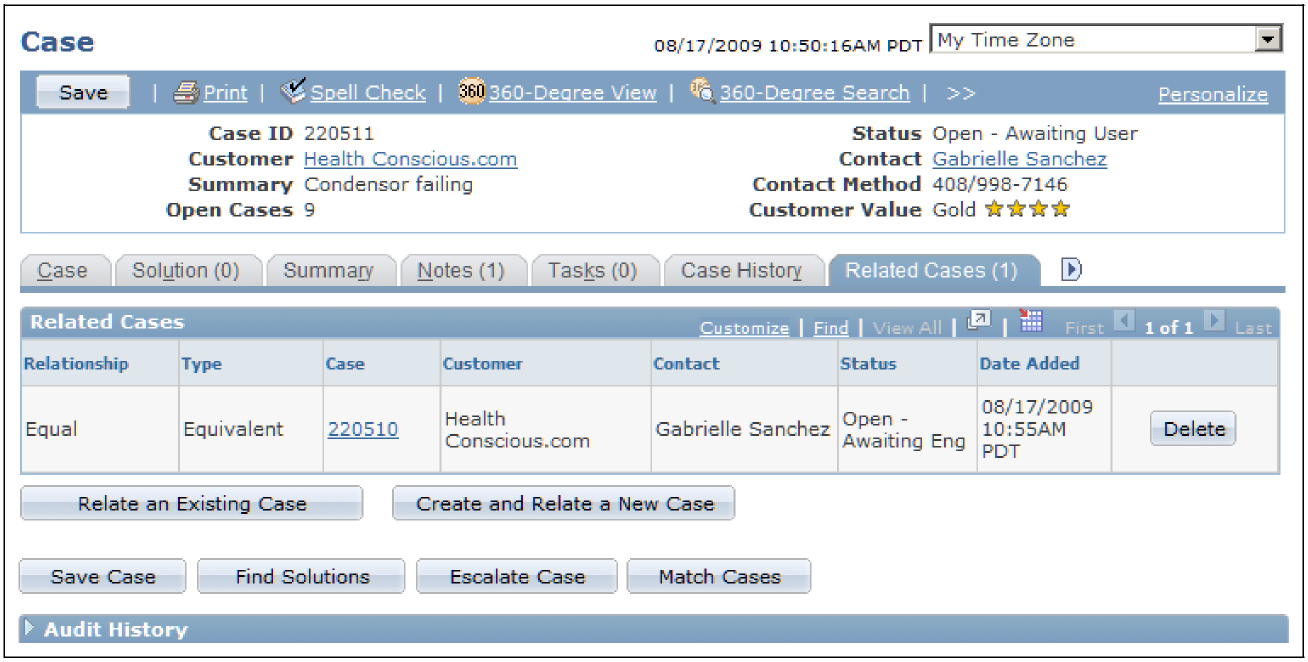
Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84

Pages Used to Manage Case Relationships

Page Name	Definition Name	Navigation	Usage
Related Cases	RC_RELATIONSHIP	• Support, Search Cases, Case, Related Cases • HelpDesk, Search Cases, Case, Related Cases • HR HelpDesk, Search Cases, Case, Related Cases • Analyst Service Center, Search Cases, Case, Related Cases	Manage case relationships, relate cases to each other based on case relationship types that your organization has established, and view and delete existing case relationships. Your organization must define case relationship types and workflow rules for cascading statuses through related cases.
Search Cases	RC_CASE_SEARCH_SEC.	Click the Relate an Existing Case button on the Related Cases page.	Select a case to relate to the current case.
Relate Existing Case - Relationship	RC_REL_TYPE_SEC	Select the case on the Relate Existing Case - Search page.	Specify the relationship details when relating a case to an existing case.
Create a New Case - Relationship	RC_REL_COPY	Click the Create and Relate a New Case button on the Related Cases page.	Specify the relationship details when you create a new related case. You can also specify which information from the originating case to copy into the case that you are creating.

Reviewing and Initiating Case Relationships

Access the Related Cases page (Support, Search Cases, Case, Related Cases or HelpDesk, Search Cases, Case, Related Cases or HR HelpDesk, Search Cases, Case, Related Cases or Analyst Service Center, Search Cases, Case, Related Cases).



Related Cases page

The Related Cases grid lists all existing case relationships.

Relationship Describes how the current case relates to the related case.

If the relationship is hierarchical, the parent case and the child case can have different values in this field. For example, one value might be *Global Case* and the other value might be *Ticket.* If the relationship is equivalent, only one label is valid.

Type The relationship type.

This value is the same for both cases in the relationship. For example, if your organization established a relationship type called *Global,* then both the parent and child record have *Global* in the Type column.

Case The case number of the related case. Click the case number link to display the related case.

Customer and **Name** For a PeopleSoft Support case, these fields identify the customer and contact who are associated with the related case.

Employee and **EmplID** (employee ID) For a PeopleSoft HelpDesk case, these fields identify the employee who is associated with the related case.

Status The status of the related case. The system gets this information from the Case Status field for the case.

Date Added The date and time that the relationship was established.

Delete Click to delete the case relationship. Clicking this button does not delete either case, only the relationship.

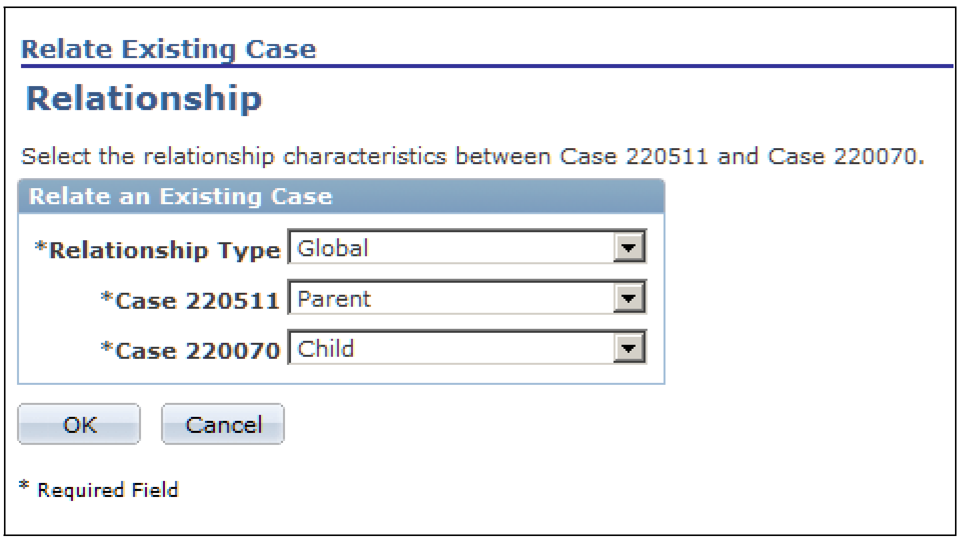
Creating New Case Relationships

Relate an Existing Case Click to display the Relate Existing Case - Search page, where you identify an existing case to relate to the current case. After you identify the case, the system displays the Relate Existing Case - Relationship page, where you establish the relationship between the cases.

Create and Relate a New Case Click to display the Create a New Case - Relationship page, where you can choose the information to be copied to the new case and establish the relationship between the cases.

Specifying Relationship Details When Relating a Case to an Existing Case

Access the Relate Existing Case - Relationship page (click the Relate an Existing Case button on the Related Cases page to access the Relate Existing Case - Search page, then select the desired case).



Relate Existing Case - Relationship page

Relationship Type Specify a relationship type. Relationship types can be either hierarchical (parent-child) or nonhierarchical. Your organization defines values that are based on the business unit of the case.

Case (current case number) and **Case** (related case number)

Select relationship labels for the current case and the case that you're relating to it.

If the relationship is hierarchical, one valid label exists for the parent case and one valid label exists for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship.

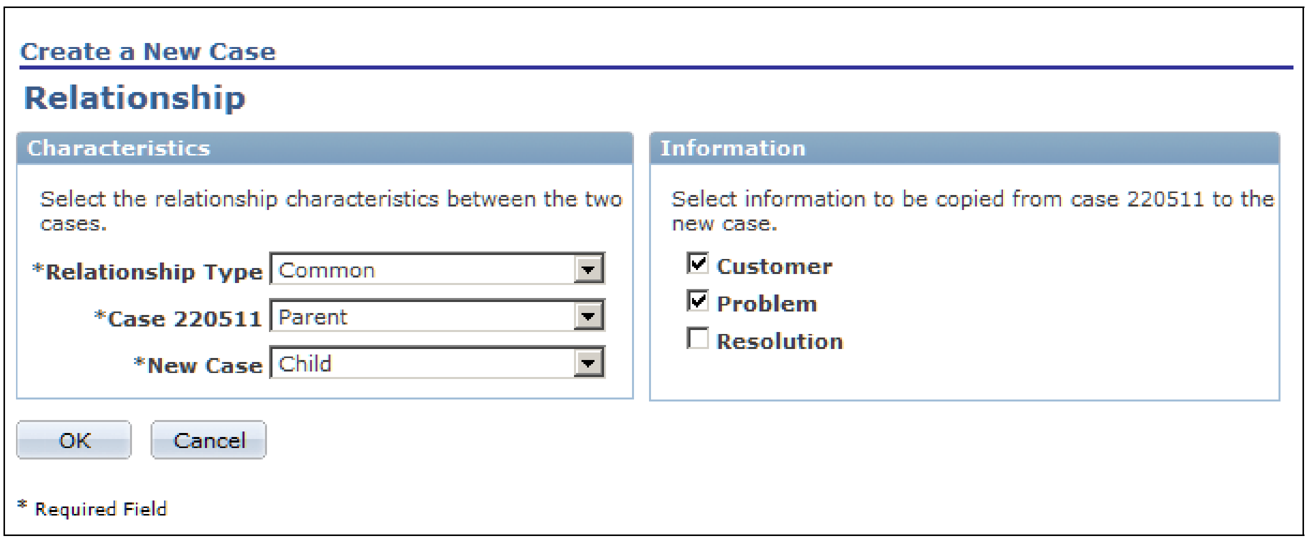
If the relationship is not hierarchical, only one valid label exists. Select that label for both cases.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84

Specifying Relationship Details When Creating a New Case

Access the Create a New Case - Relationship page (click the Create and Relate a New Case button on the Related Cases page).



Create a New Case - Relationship page

Characteristics

Relationship Type

Specify a relationship type. Relationship types can be either hierarchical (parent-child) or nonhierarchical. Values are defined by your organization and are based on the business unit of the case.

Case (current case number) and **New Case**

Select relationship labels for both the current case and the new case that you're creating.

If the relationship is hierarchical, one valid label exists for the parent case and one valid label exists for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship.

If the relationship is not hierarchical, only one valid label exists. Select that label for both cases.

Information

The system always copies the business unit to the new case. You choose which other information to copy to the new case.

Customer

In PeopleSoft Support, select this check box to copy the caller from the originating case to the new case. The system copies the customer, contact, site, PIN (person identification number), SIN (site identification number), contact method, and contact details.

Employee

For PeopleSoft HelpDesk applications, select this check box to copy the caller from the originating case to the new case. The system copies the employee number, employee name, phone type, email address type, contact method, contact details, and alternate contact.

Problem

Select to copy problem information from the originating case to the new case. The system copies the problem summary, description, case status, case type, source, priority, severity, impact, error code, error message, resolved on first contact, closed date and time, provider group, assignee, product, problem type, serial number, asset tag, and category, type, and detail information.

If you do not copy problem information, the summary for the newly created case identifies the originating case.

Note. If you don't copy caller information to the new case, then the product, serial number, and asset tag that are copied might not be valid for the caller that you identify. In this situation, modify the values before saving the case.

Resolution

Select this check box to copy resolution information from the originating case to the new case. The system copies all attempted resolutions and their statuses, but not the resolution notes.

OK

Click this button to create the new case, establish the relationship between the two cases, and return to the Related Cases page. If you are not copying caller information, the system prompts you to identify the caller for the new case before the case is created.

Cancel

Click this button to return to the Related Cases page without establishing the relationship.

See Also

Chapter 10, "Managing Cases," page 241

Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 84

Managing Related Actions

This section provides an overview of related actions and discusses how to:

- Review related actions and initiate new relationships.
- Use business projects.
- Send case surveys.
- Initiate and relate scripts.
- Relate existing quality defects.
- Create new defects.
- Create and relate sales leads.
- Create and relate sales orders.
- Create and relate a return material authorization (RMA).
- Create and relate service orders.
- Relate change requests.
- Create change requests.

Understanding Related Actions

In PeopleSoft CRM, you can:

- Manually create a related action on a case.
- Configure the system so that selecting a quick code suggests an action.
- Configure the system so that PeopleSoft's AAF system suggests an action.

Note that in Service Center for Higher Education, some listed actions may not be applicable for all roles (constituent, company contact, or worker). If an action is attempted for someone whose role does not permit that action, an error message will be displayed to inform the user that the action is not available.

Related Actions for PeopleSoft Support, HelpDesk, and Service Center for Higher Education Cases

This table describes which related actions you can associate with PeopleSoft Support, PeopleSoft HelpDesk, and Service Center for Higher Education cases:

Link	Description
Business Project	Launches the Use Business Project page, which lets the user select a business project that they want to associate with the case.
Case Survey	Launches the Send Case Survey page, where an agent can enter a business unit, dialog name, and action to send a survey to the customer. **Note.** You can also set up this link to automatically launch a survey and bypass the Send Case Survey page. In addition, the PeopleSoft system delivers the roles of Call Center Manager and Help Desk Manager to this permission list to be used for the new survey reports. Users who are not authorized to view the reports will not be able to see the links in the Related Actions field.
Defect-Create New	Create defects to identify problems with your products.
Defect — Relate Existing	Associate existing defects with cases.

You can set up additional link definitions to launch PeopleSoft Enterprise Real-Time Advisor, or a specific branch script, or a specific business project.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Related Actions for PeopleSoft HelpDesk and Service Center for Higher Education Cases

This table describes related actions that you can associate with PeopleSoft HelpDesk case and Service Center for Higher Education cases created for workers:

Object	Description
Asset Discovery	Launches an asset management application from a case to gather information about networked devices.
Asset Summary	Launches an asset management application, which passes the desired asset information to the application for reporting.
Change Request - Create New	Creates a new change request.

Object	Description
Change Request - Relate Existing	Relates an existing change request to the case. For example, you may want to use Change Request - Relate Existing when a caller has a problem with their email system. The agent knows that this has been a reported problem in the past and finds a related change request. Through Related Actions, the agent associates this new case to the existing change request.
Remote Control	Launches the asset management application from a case to perform troubleshooting on a remote device, such as an employee's laptop.
Software Delivery	Launches your third-party Software Delivery application, which can be used to install software on various identified assets.
Work Order - Create New	Launches the Create Work Order page, where an agent who is working on a help desk case can create a work order from the case to assign a technician to troubleshoot and solve the problem.

Related Actions for PeopleSoft Support and Service Center for Higher Education Cases

This table describes related actions that you can associate with PeopleSoft Support cases and Service Center for Higher Education cases created for consumers or companies:

Object	Description
Branch Script	Launches a specified branch script.
Create RMA	An RMA authorizes a customer to return defective or unwanted materials. You can manage RMAs only if PeopleSoft Support is integrated with PeopleSoft Inventory.
Sales Lead	Sales leads populate the sales pipeline. You can create sales leads only if you have implemented PeopleSoft Sales.
Sales Order	A sales order records a request for a product that is provided by your company's sales, marketing, or field services organization. You can create sales orders only if you've implemented PeopleSoft Order Capture.
Service Order	A service order records a request for a service that is provided by your company's field services organization. You can create service orders only if you've implemented PeopleSoft FieldService.

Service Order and Material Return Comparison

When customers report problems with broken or defective parts or materials, you can do one of the following:

- If the customer is entitled to on-site service, create a service order so that your organization can send a field service technician to the customer's site to repair the part.
- If the customer is not entitled to on-site service, create a return material authorization (RMA) so that the customer can return the merchandise.

Pages Used to Relate a Case to Other PeopleSoft CRM Objects

Page Name	*Definition Name*	*Navigation*	*Usage*
Related Actions	RC_ASSOCIATION	• Support, Search Cases, Case Scroll down to the Actions section. • HelpDesk, Search Cases, Case Scroll down to the Actions section. • HR HelpDesk, Search Cases, Case Scroll down to the Actions section. • Analyst Service Center, Search Cases, Case Scroll down to the Actions section.	Relate a case to other PeopleSoft CRM objects. In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HRMS database. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.

Page Name	Definition Name	Navigation	Usage
Use Business Project	RC_LINK_GENBP_SEC	• In the Actions section on the Case page, select *Business Project* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Business Project* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Business Project* from the Related Actions drop-down list box, then click the Go button.	Associate business projects with a case.
Send Case Survey	RC_LINK_SEND_SRVY	• In the Actions section on the Case page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button.	Send case surveys to existing customers.

Page Name	***Definition Name***	***Navigation***	***Usage***
Use Branch Script page	RC_LINK_SCRIPT_SEC	• In the Actions section on the Case page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button.	Select a branch script to relate to a case.
Defects and Enhancements	RC_CASE_DEFECT_SEC	• In the Actions section on the Case page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button.	Search for and identify a defect to relate to the case.

Page Name	***Definition Name***	***Navigation***	***Usage***
Quality Management - Defect	RQ_DEFECT_MAIN	• In the Actions section on the Case page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button.	Add a new defect and relate it to the case.
Return Material Authorization	RC_RMA_HDR	• In the Actions section on the Case page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button.	Create an RMA and relate it to the current case.

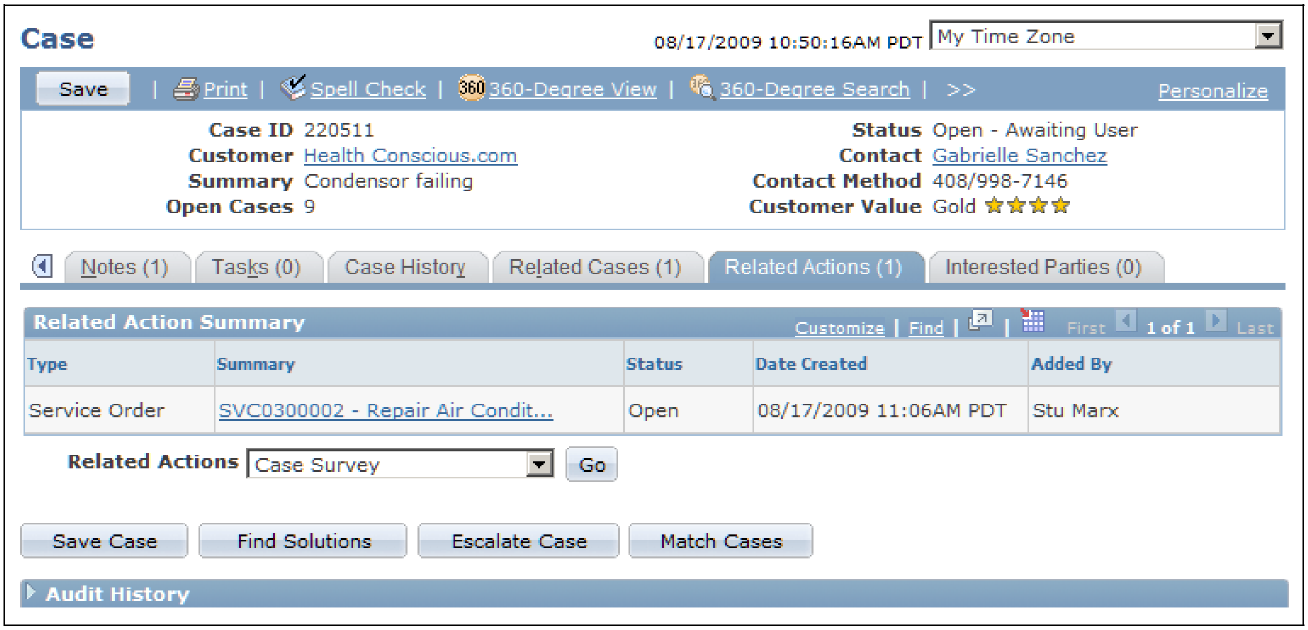
Page Name	***Definition Name***	***Navigation***	***Usage***
Create Sales Lead	RC_LINK_LEAD_SEC	• In the Actions section on the Case page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button.	Create a sales lead and relate it to the current case.
Create Order	RC_LINK_RO_SEC	• In the Actions section on the Case page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button.	Create an order and relate it to the current case.

Page Name	***Definition Name***	***Navigation***	***Usage***
Create Service Order	RC_LINK_RO_SEC	• In the Actions section on the Case page, select *Service Order* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Service Order* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Service Order* from the Related Actions drop-down list box, then click the Go button.	Create a service order and relate it to the current case.
Change Requests	RC_CASE_CHANGE_SEC	• In the Actions section on the Case page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button.	Search for and identify a change request to relate to the case.

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Request	RG_CHANGE_REQUEST	• In the Actions section on the Case page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Summary page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button. • In the Related Actions section on the Related Actions page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button.	Create change requests.

Reviewing Related Actions and Initiating New Relationships

Access the Related Actions page (Support, Search Cases, Case, or HelpDesk, Search Cases, Case, or HR HelpDesk, Search Cases, Case, or Analyst Service Center, Search Cases, Case — scroll down to the Actions section).



Related Actions page

Related Actions Summary

This grid lists all existing relationships between the current case and other PeopleSoft CRM objects.

Type

The types of related objects include: *Customer Satisfaction Script, Lead Qualification Script, Troubleshooting Guide, Business Project, Sales Lead, Sales Order, RMA,Quality Defect,* or *Service Order.*

Summary

A description of the object, derived from the description field on the page where the object is maintained.

Status

Indicates the status of the related object that is associated with the case.

Date Created

The date that the object was created and associated with the case.

Related Actions

Select the type of action that you want to create and relate to the case.

Note. Based on the products that you have installed you may want to change the list of objects that appear in the drop-down list box. For example, if you don't have PeopleSoft FieldService installed, you wouldn't want Service Order to appear.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Modifying Industry-Specific Translate Values.

Go

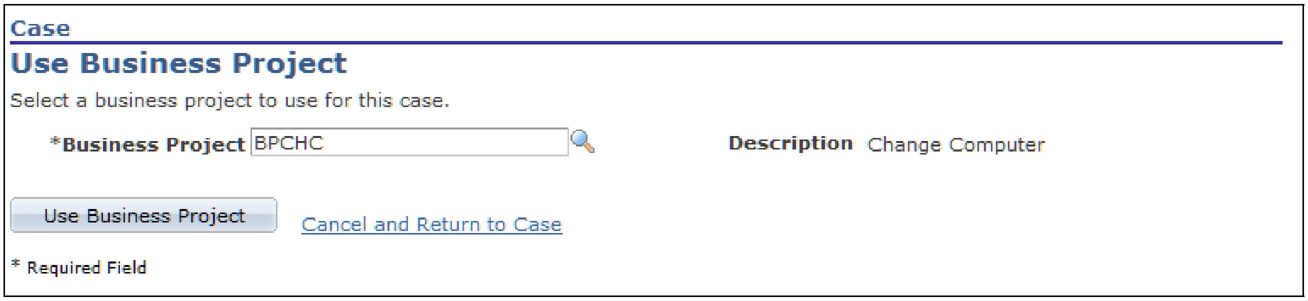
After you select an action, click Go to access the page where you enter information specific to the type of object that you're creating.

Refresh Related Actions Click this button to refresh the Status field for the work orders or other related actions that you executed from this page.

This button is hidden when you first install the application. You must use the Display Template pages to configure this page to display the button.

Using Business Projects

Access the Use Business Project page (in the Actions section on the Case, Summary, or Related Actions page, select *Business Project* from the Related Actions drop-down list box, then click the Go button).



Use Business Project page

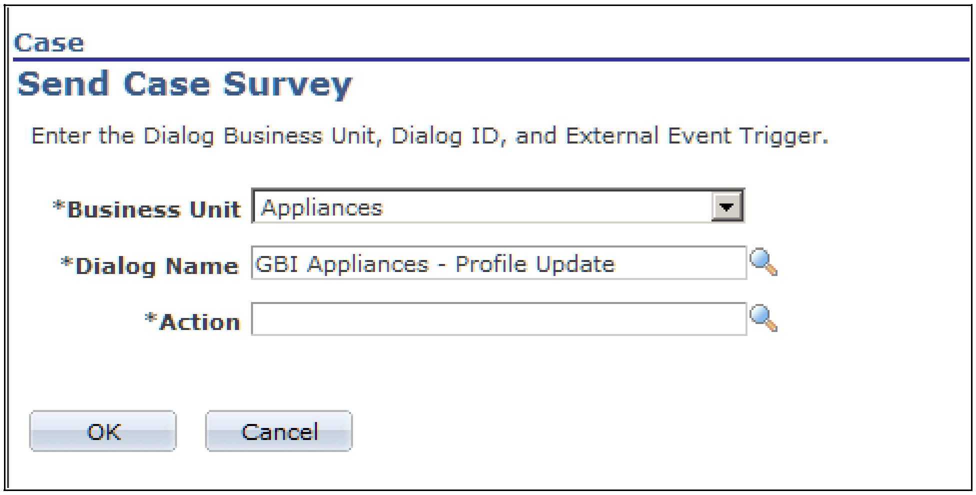
Select the business project that you want to use for the case. Click the Use Business Project button to launch the business project.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Setting Up Business Projects"

Sending Case Surveys

Access the Send Case Survey page (in the Actions section on the Case, Summary, or Related Actions page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button).



Send Case Survey page

Select the business unit, dialog name, and action that you want to use to send a survey to the customer associated with the case; click OK.

Note. You can also set up this link to automatically launch a survey and bypass the Send Case Survey page. To do this, you must modify the system data and use the Search Keys group box on the Link Definition page to select the last three terms that appear under Call Center, Link Definition after you select the Add Term button. There terms are: *Select a Dialog Business Unit <BUSINESS_UNIT>*, *Select a Dialog ID <DIALOG_ID>*, and *Select an External Event Trigger <EXT_EVENT_TRIGGER>*.

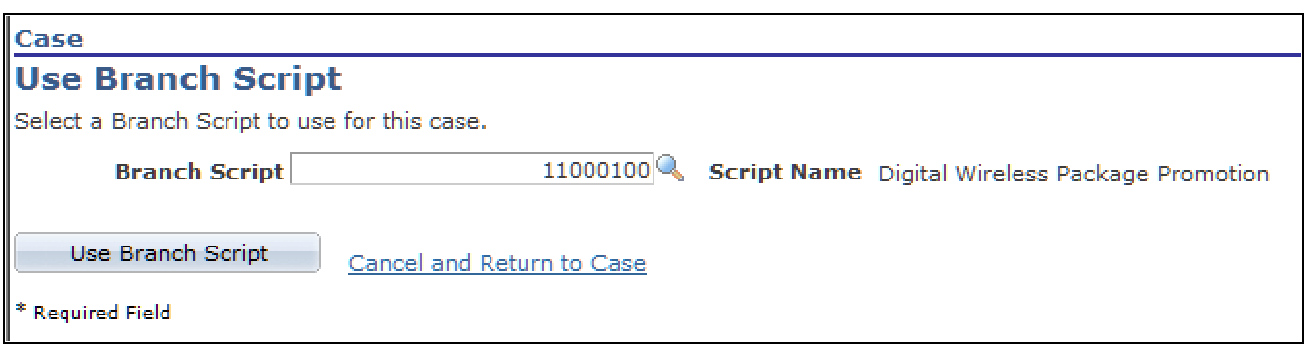
See Also

Chapter 5, "Setting Up Links and Related Actions," page 99

PeopleSoft Enterprise Online Marketing 9.1 PeopleBook, "Designing Web Documents," Understanding Surveys

Initiating and Relating Scripts

Access the Use Branch Script page (in the Actions section on the Case, Summary, or Related Actions page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button).



Use Branch Script page

Note. You can relate a different branch script multiple times to a single case. You can also relate the same branch script to a single case multiple times.

Branch Script Select the desired script from the predefined scripts available in the list.

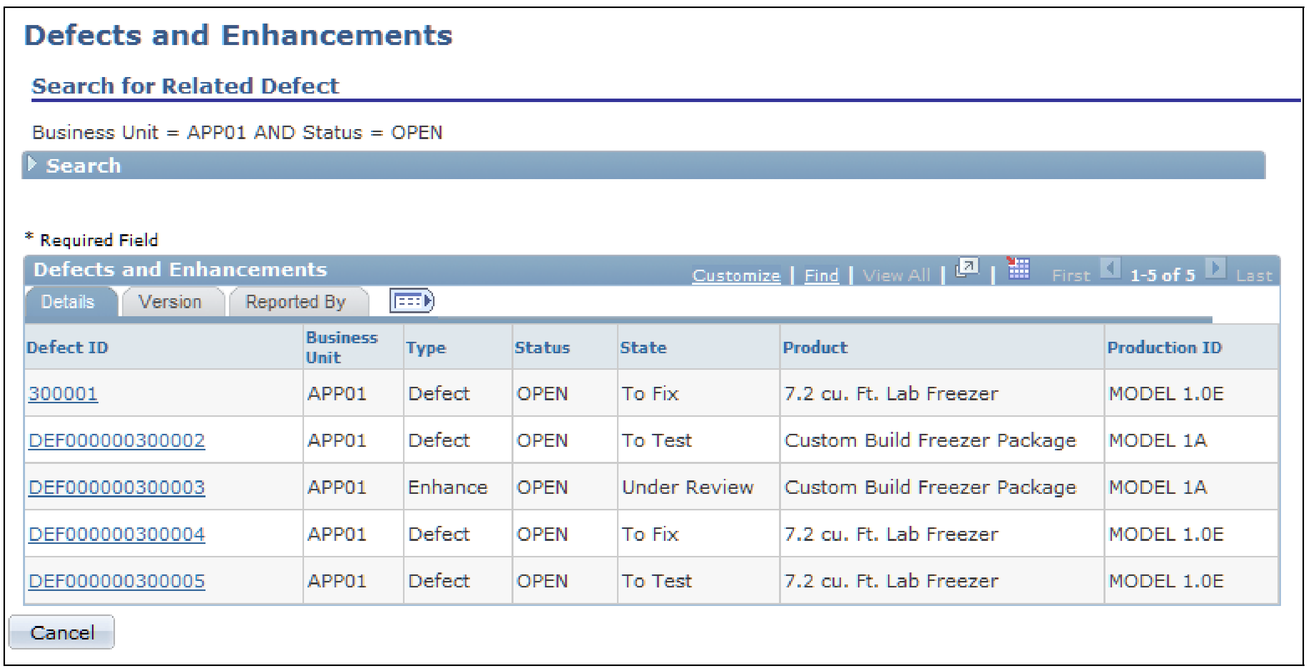
Use Branch Script Click to launch the script on the Execute Script page. Once you launch the script, the relationship between the case and the script is established.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Defining Scripts"

Relating Existing Quality Defects

Access the Defects and Enhancements page (in the Actions section on the Case, Summary, or Related Actions page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button).



Defects and Enhancements page

On this page, you can sort and filter to narrow down your list of defects, or you can search for other defects.

Business Unit Select the business unit for the defect that you want to relate to the case. The default comes from the Business Unit (Quality) field in the Call Center BU page.

Defect ID Select the defect that you want to relate to the current case.

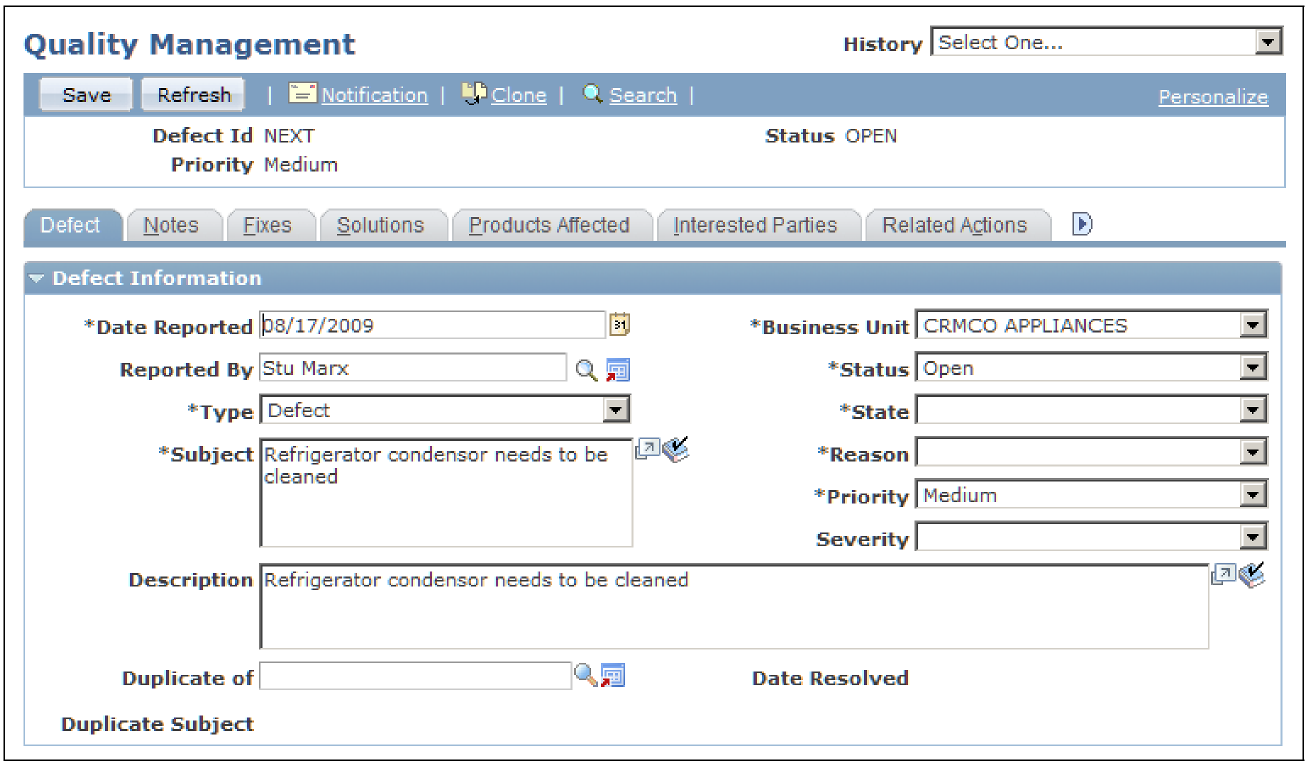
See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Call Center Business Units, page 28

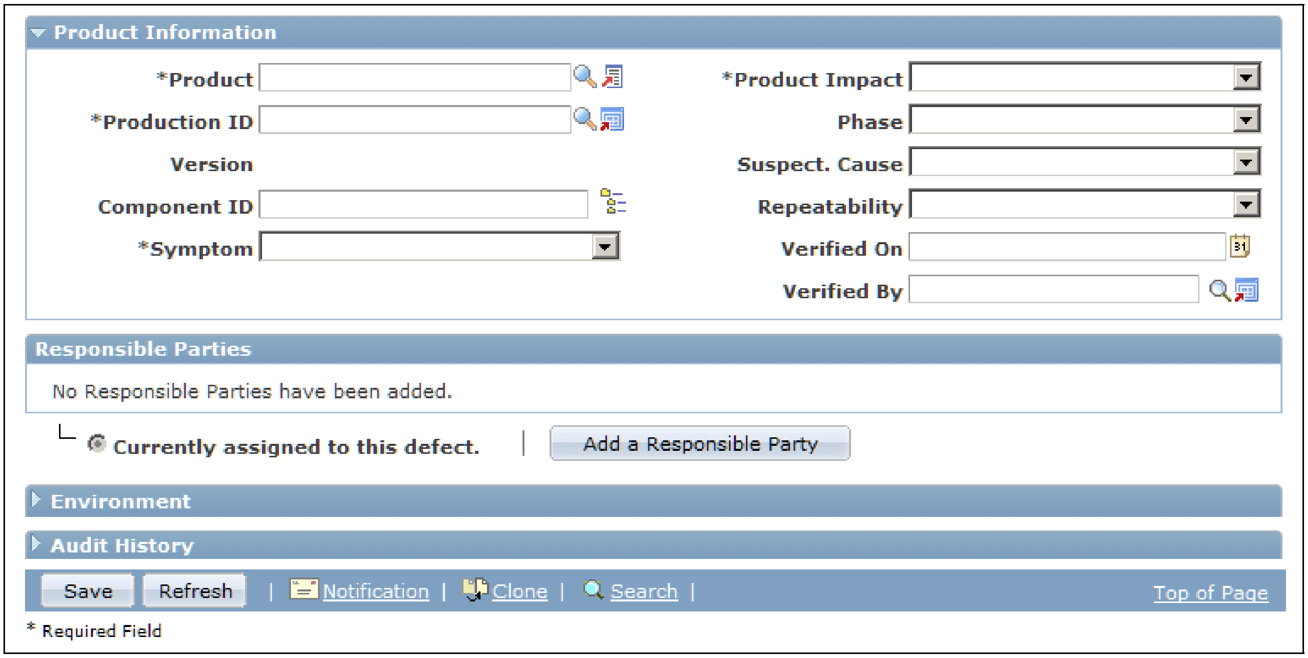
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Creating New Defects

Access the Quality Management - Defect page (in the Actions section on the Case, Summary, or Related Actions page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button).



Quality Management - Defect page (1 of 2)



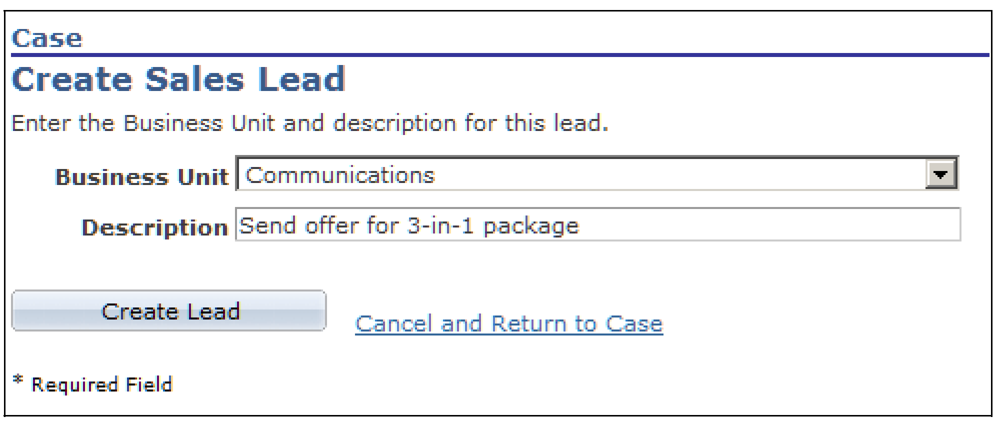
Quality Management - Defect page (2 of 2)

For instructions about using the Quality Management - Defect page:

See Chapter 19, "Managing Defects and Fixes," page 451.

Creating and Relating Sales Leads

Access the Create Sales Lead page (in the Actions section on the Case, Summary, or Related Actions page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button).



Create Sales Lead page

Note. Only PeopleSoft Support or Service Center for Higher Education users can create sales leads. This functionality is not available in PeopleSoft HelpDesk applications.

Business Unit

Select a sales business unit for the lead that you're creating. The default comes from the Sales Unit field on the Call Center BU page.

Description

Enter a description for the new lead.

Create Sales Lead

Click to create the lead.

See Also

PeopleSoft Enterprise Sales 9.1 PeopleBook, "Creating Sales Leads and Opportunities"

Creating and Relating Sales Orders

Access the Create Order page (in the Actions section on the Case, Summary, or Related Actions page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button).

Create Order page

Note. Only PeopleSoft Support or Service Center for Higher Education users can create orders. This functionality is not available in PeopleSoft HelpDesk applications.

Business Unit

Select an order business unit for the order that you're creating. Business units are limited to those using the same customer setID as the case.

Description

Enter a description for the new order.

Create Order

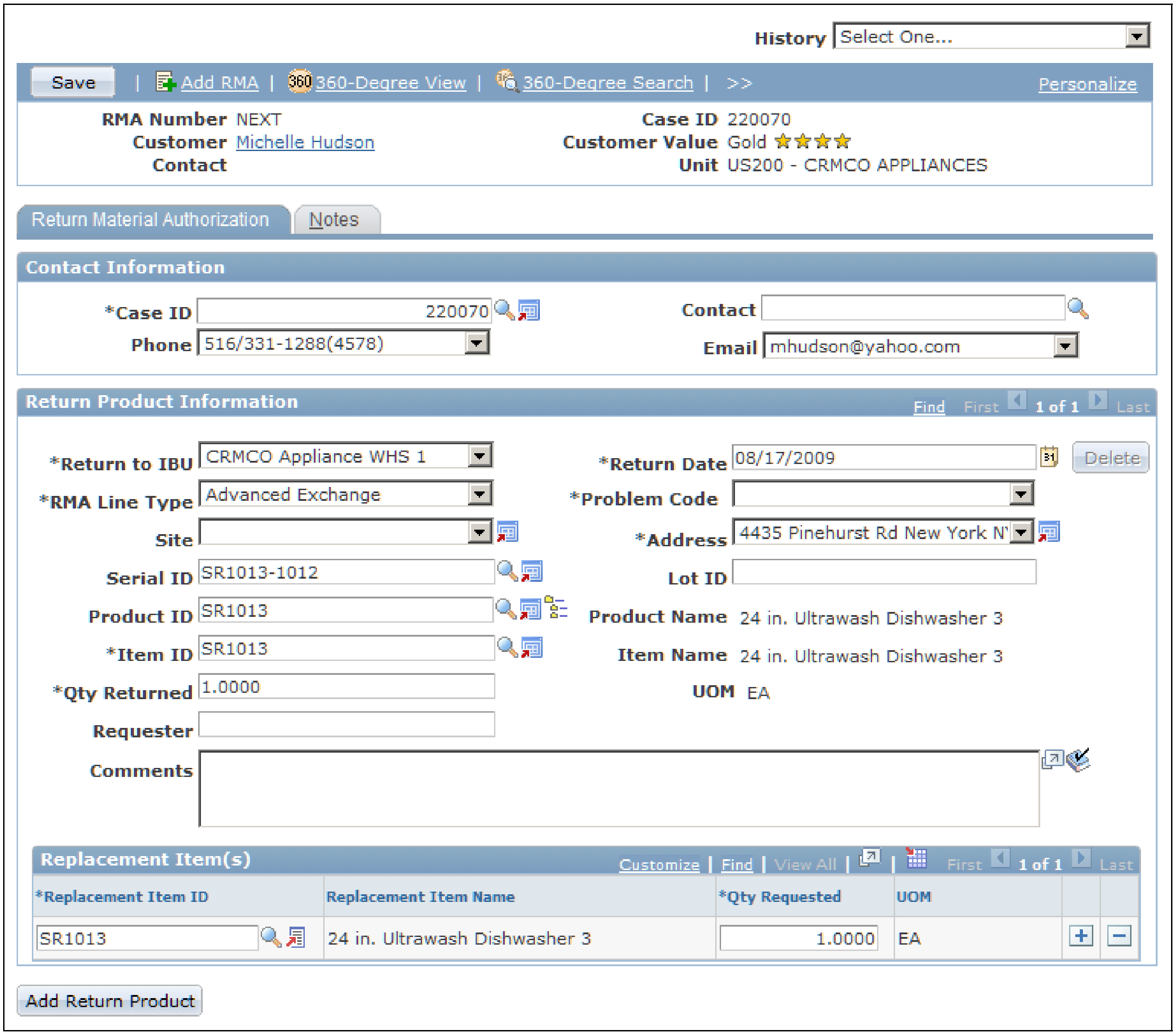
Click to create the order.

See Also

PeopleSoft Enterprise CRM 9.1 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Creating and Relating RMAs

Access the Return Material Authorization page (in the Actions section on the Case, Summary, or Related Actions page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button).



Return Material Authorization page

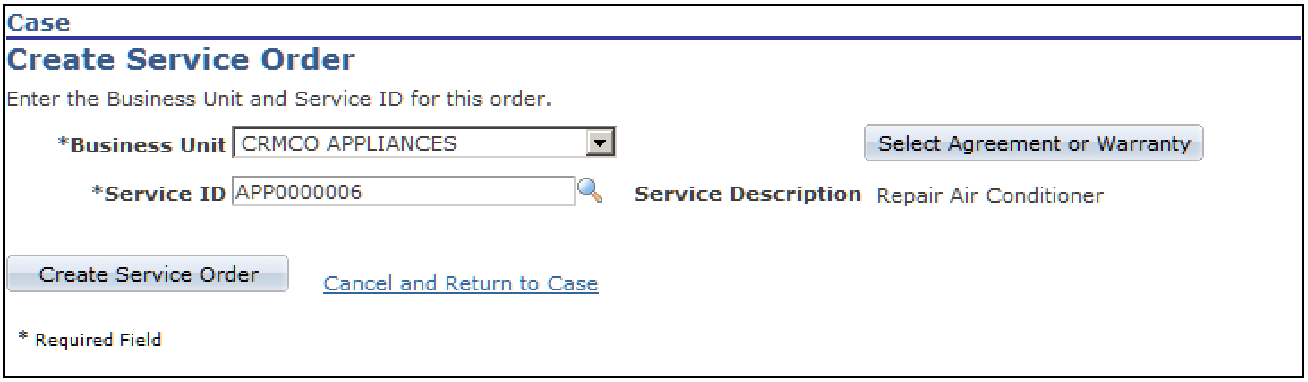
Note. Only PeopleSoft Support users or Service Center for Higher Education can create RMAs. This functionality is not available in PeopleSoft HelpDesk applications.

See Also

Chapter 14, "Managing Material Returns," page 381

Creating and Relating Service Orders

Access the Create Service Order page (in the Actions section on the Case, Summary, or Related Actions page, select *Service Order* from the Related Actions drop-down list box, then click the Go button).



Create Service Order page

Note. Only PeopleSoft Support or Service Center for Higher Education users can create service orders; this functionality is not available in PeopleSoft HelpDesk applications.

Business Unit Select a business unit for the service order that you're creating. The default comes from the Service Order Unit field in the Call Center BU page.

Service ID Select the service that is to be performed.

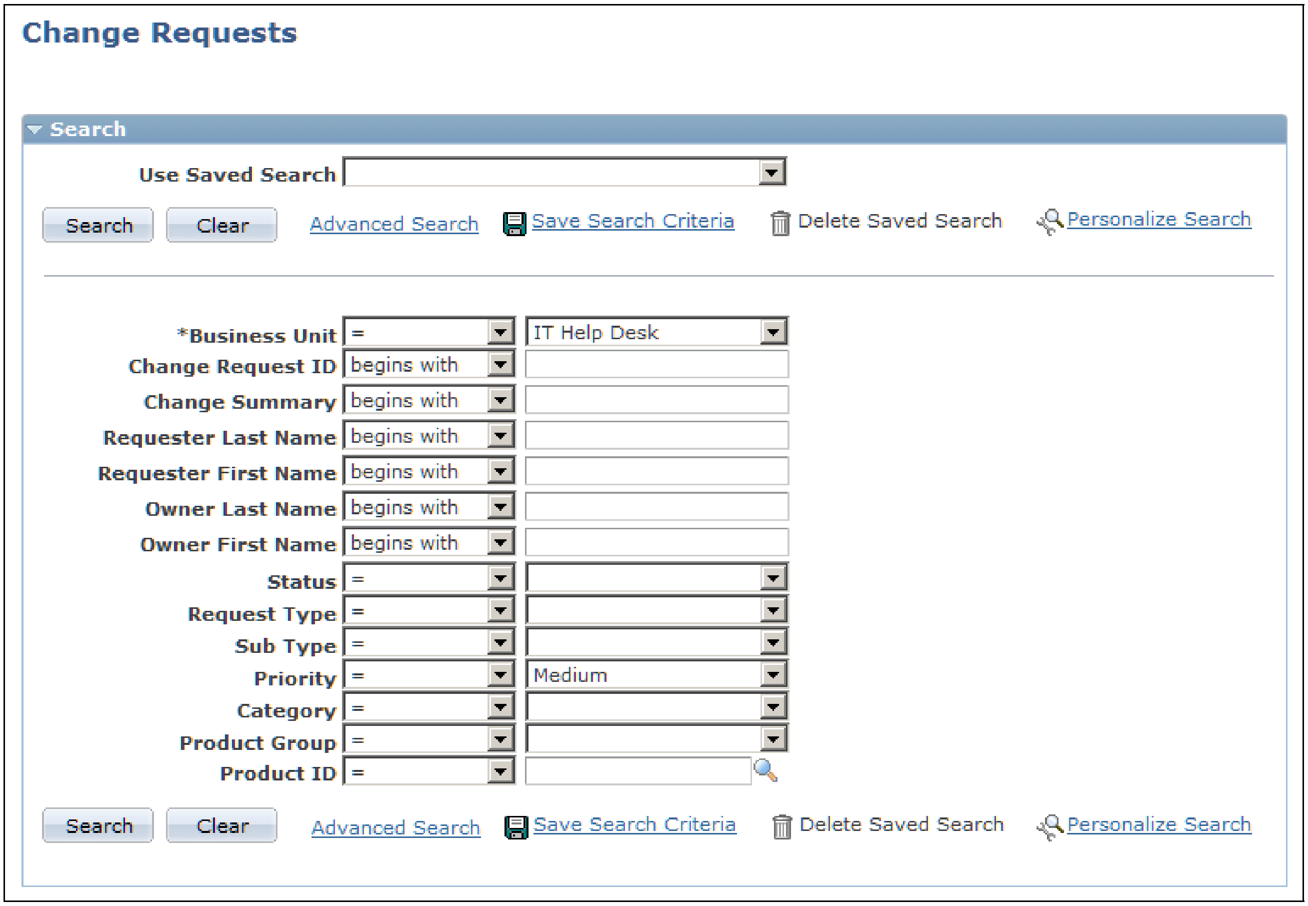
Create Service Order Click to create the service order.

See Also

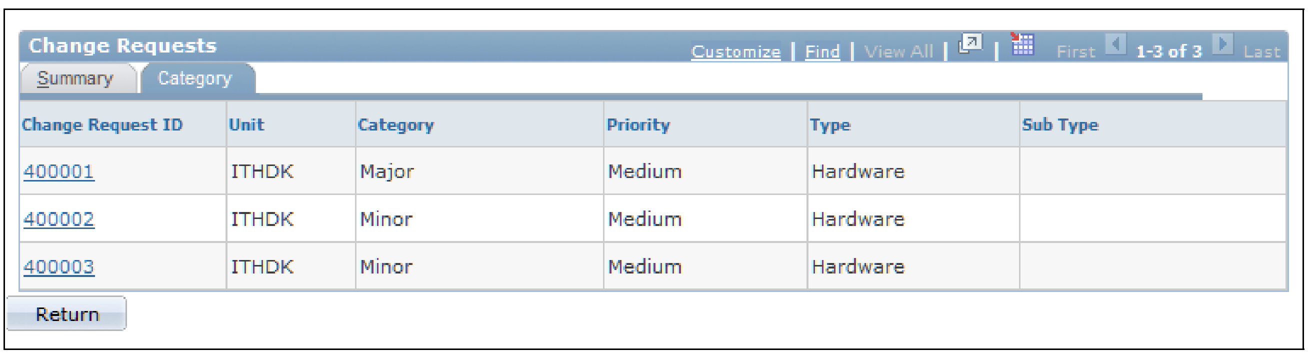
PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Creating and Managing Service Orders"

Relating Change Requests

Access the Change Requests search page (in the Actions section on the Case, Summary, or Related Actions page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button).



Change Requests search page (1 of 2)



Change Requests search page (2 of 2)

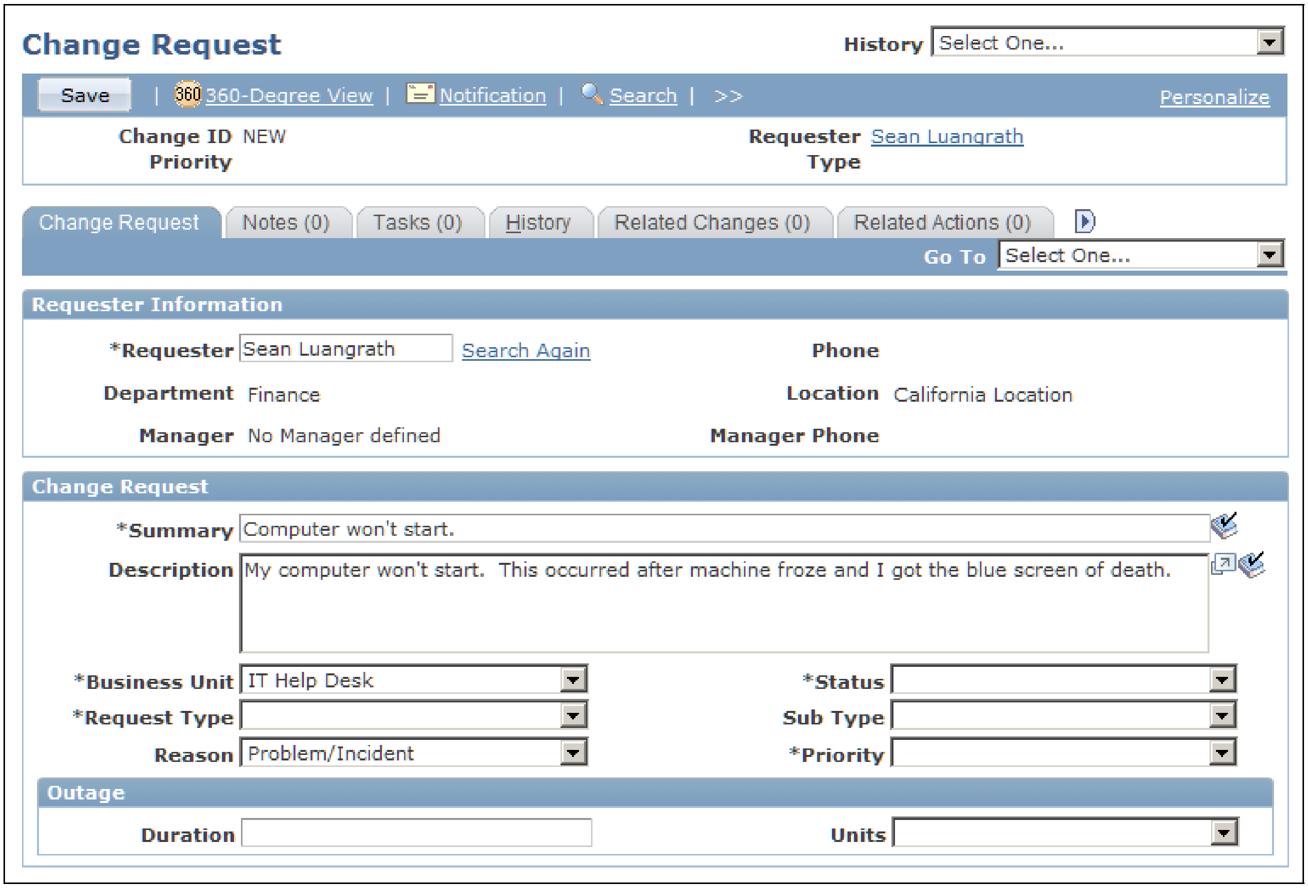
Note. Only PeopleSoft HelpDesk or Service Center for Higher Education users can relate change requests; this functionality is not available in PeopleSoft Support applications.

To relate an existing change request to a case, click one of the change requests that appears in the Search Results grid. The Change Request appears in the Related Actions Summary grid on the Case - Summary page and the Case - Related Actions page.

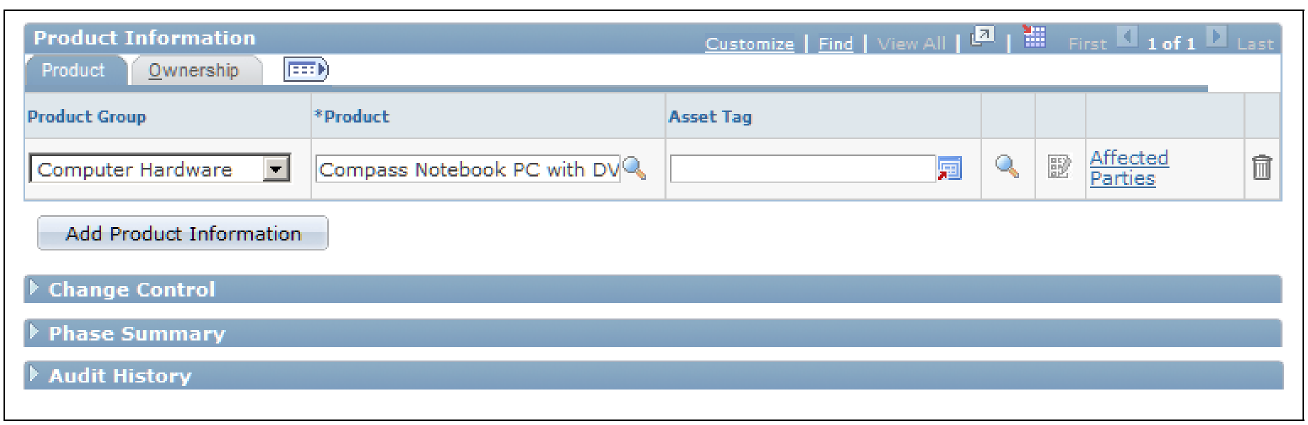
To add a new change request, click the Add Change Request button at the bottom of the page.

Creating Change Requests

Access the Change Request page (in the Actions section on the Case, Summary, or Related Actions page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button).



Change Request page (1 of 2)



Change Request page (2 of 2)

Note. Only PeopleSoft HelpDesk or Service Center for Higher Education users can create change requests. This functionality is not available for PeopleSoft Support users.

For instructions about using the pages in this component:

See Chapter 18, "Using Change Management," page 425.

Identifying Interested Parties

The main people associated with a case are those who have the problem (customer contacts, consumers and their contact, employees and their alternate contacts) and the agent to whom the case is assigned.

Additionally, there may be many other people interested in the case and its progress, such as agents who are working on the case or a similar case, a customer's account manager and sales representative, and so on.

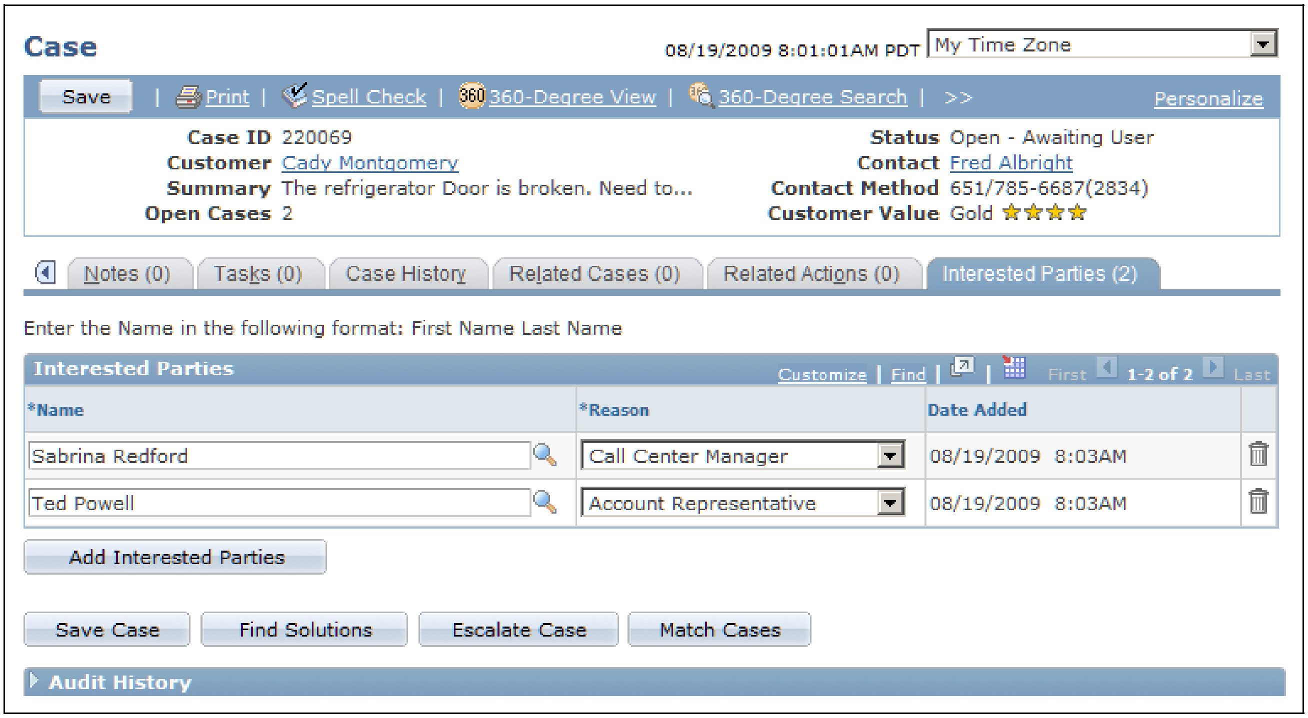
By adding people to the list of interested parties for the case, you facilitate communication with these people. When you send a notification from the case, the Outbound Notification page includes a check box that you can select to send the notification to the interested parties in addition to any other addressees.

Page Used to Identify Interested Parties

Page Name	*Definition Name*	*Navigation*	*Usage*
Interested Parties	RC_INTEREST_PARTY	• Support, Search Cases, Case Click the Add Interested Parties button on the Summary page • HelpDesk, Search Cases, Case Select the Add Interested Parties button on the Summary page. • HR HelpDesk, Search Cases, Case Select the Add Interested Parties button on the Summary page. • Analyst Service Center, Search Cases, Case Select the Add Interested Parties button on the Summary page.	List the names of people who might want to receive information about this case.

Identifying Interested Parties

Access the Interested Parties page (Support, Search Cases, Case or HelpDesk, Search Cases, Case or HR HelpDesk, Search Cases, Case or Analyst Service Center, Search Cases, Case — select the Add Interested Parties button on the Summary page, or click on the Interested Parties page tab).



Interested Parties page

Name

To be an interested party, a person must have a person record in the PeopleSoft CRM database.

For the system to send notifications to the person, the person must have a user ID (for worklist notifications) or an email address (for email notifications).

Reason

The reason that the person is included as an interested party. Your organization defines values based on the business unit of the case. The reason codes shown here are those defined with the reason type *Reason Interested.*

Date Added

The date and time that the person was added as an interested party.

Recording Billing Information

The PeopleSoft system enables the PeopleSoft Support and vertical applications that are using PeopleSoft Support to bill for their services. Cases with an agreement can be billed through contracts. Cases with a warranty, or no agreement, are called on demand and sent to the contract interface table, and then to billing. The PeopleSoft Contracts system takes care of the billing and accounting rules.

The Billing page is delivered hidden. If you want to bill for cases, modify the template to enable the page and perform the setup for billing.

Note. This functionality is not available to PeopleSoft HelpDesk, HelpDesk for Human Resources, or Analyst Service Center. You can control access to the billing page using regular role based security. Only the manager role has access; agents do not have access

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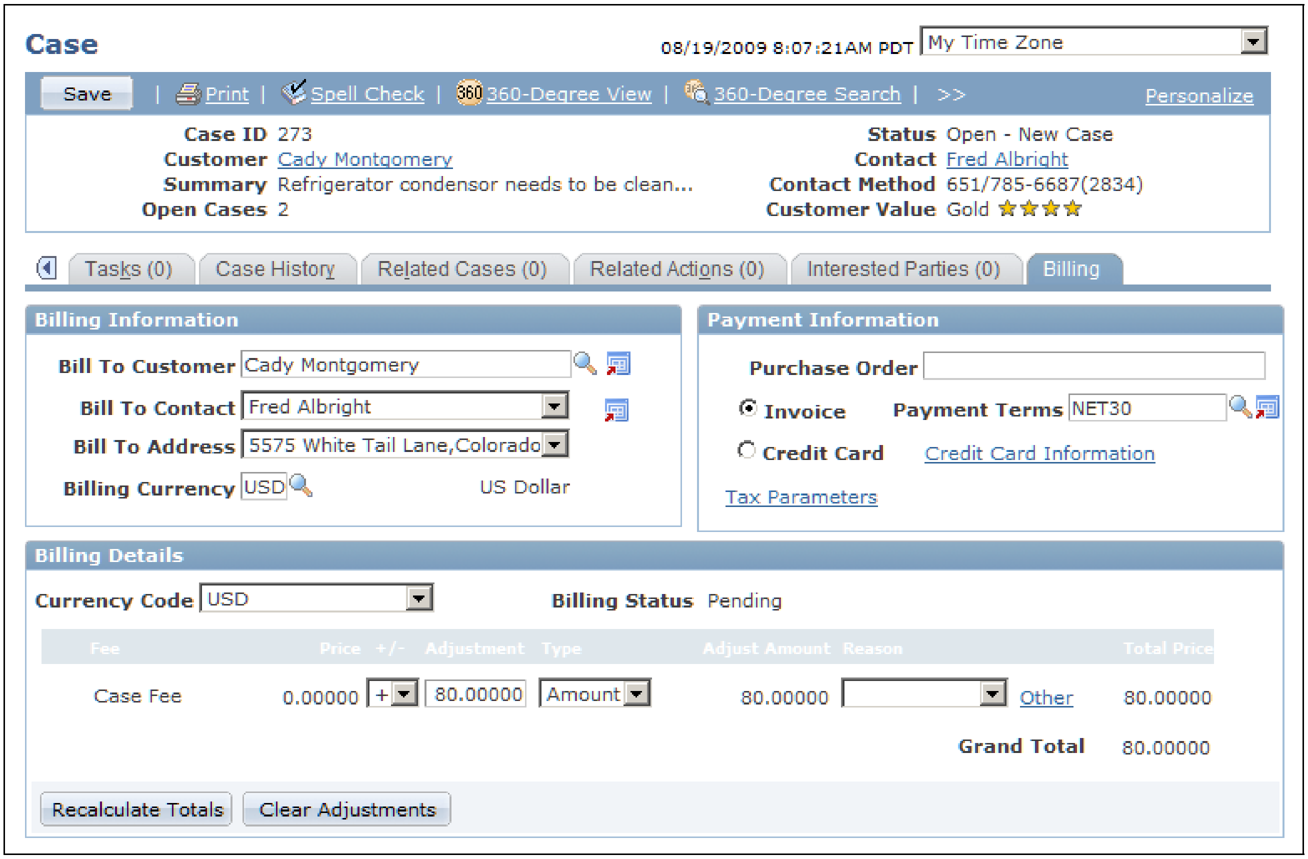
See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*, "Setting Up an Integration to the Transaction Billing Processor," Understanding PeopleSoft CRM Integration with the Transaction Billing Processor.

Page Used to Record Billing Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Billing	RC_CASE_BI	Support, Search Cases, Case, Billing	Manage billing information for a case.

Recording Billing Information

Access the Billing page (Support, Search Cases, Case, Billing).



Billing page

This page serves multiple purposes. It enables a user with a manager role to view billing information, purchase order numbers, and authorize credit card information for the service that is performed at the customer site. It also enables users to view subtotals for fees by case or by time, apply adjustments to transaction fees, recalculate totals, and view the billable amount in the customer's currency.

Billing Information

The system populates this group box with information from the bill to customer on the case.

Bill to Customer Select the customer that should be billed for the case.

Bill To Contact Select the contact that should be billed for the case.

Bill To Address Select the customer address to which the bill should be sent.

Bill Currency Select the currency that the customer is using for the transaction.

The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice.

Payment Information

Purchase Order

Enter the customer-provided purchase order number.

Note. This field does not have any integration to PeopleSoft Supply Chain Management (PeopleSoft SCM) and is not required. If you enter a purchase order number in this field, the system posts it to PeopleSoft Contracts. When PeopleSoft Contracts sends the information to PeopleSoft Billing for invoice generation, the system prints the purchase order number on the invoice.

Invoice

Select if the customer intends to pay for the service by invoice.

Payment Terms

If you selected the Invoice option, use this field to select the billing cycle for the invoice (for example, *NET30 - Due in 30 days*). The payment terms appear on the invoice that is sent to the customer.

Credit Card

Select if the customer intends to pay for the service by credit card.

Credit Card Information

Click to access the Credit Card Details page, where you enter credit card authorization information, such as the card type, card number, expiration month, and year. The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page.

Note. You can integrate credit card information with Cybersource, a third-party taxware vendor.

Tax Parameters

Click to access the Tax Parameters page, where you indicate whether the customer is exempt from taxes. If the customer is tax exempt, enter the exemption certificate number and tax code that the customer supplies to you.

The system uses a default tax code based on the customer's address, but you can override it by choosing another value.

Billing Details

A case can be billed by case (flat fee) or time. Billing applies to either on demand cases or agreement cases. When a case is created with an agreement, and pricing is enabled from the installation options component, the case is billed based on the transaction fee defined in that agreement line.

The transaction fee can be either a flat fee or time based. When a case is created without an agreement, the on-demand case fee is applied. Based on business unit setup (whether the on-demand case is billed by time or by case), it retrieves pricing information from the pricing setup for either case-based or time-based billing.

When a case is billed by case, only a flat fee is applied. When a case is billed by time, it is billed based on the total billable hours worked on that case, multiplied by the hourly rate. Once the case is billed, you cannot enter any more billable hours.

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system then calculates the sum of all lines, including those that have changed, and provides the recalculated amount in the Total Amount field.

+/−	Select the plus sign (+) to indicate a positive adjustment to the price or the minus sign (−) to indicate a negative adjustment to the price.
Adjustment	Enter either a currency amount or a percentage value.
Type	Select *Percent* or *Amount.*
Reason	Select the reason for the adjustment. These values are user-definable on the Reason Code setup page. The PeopleSoft system delivers this feature without any valid values.
Other	If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page, where you can enter a unique description of the reason.
Recalculate Totals	Click this button any time there is a change to the Billing Details grid that affects the price or the currency code. The system recalculates the total cost of the fees.
Clear Adjustments	Click this button to clear the adjustments that were made and return to the original total amounts.

Entering Attribute Information

Attributes enable you to extend the information stored for a case without modifying that case's base table. This capability is valuable when you want to capture additional information about a case that is not available.

For example, you might need to capture the color and size attributes for certain types of products but not for all products. Because these attributes are relevant only for some products, you do not want to add them as fields to the base table itself.

See Also

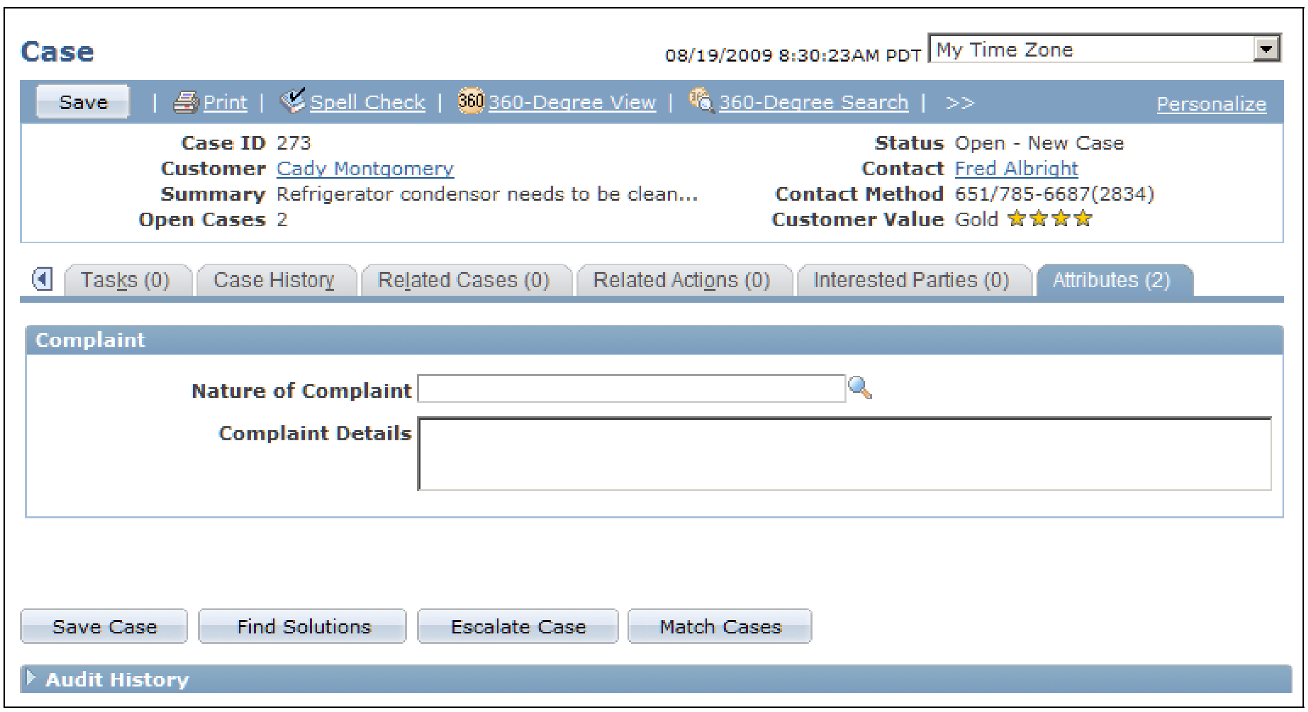
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Attributes"

Page Used to Enter Attribute Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Attributes	RC_ATTR_CASE	• Support, Search Cases, Case, Attributes • HelpDesk, Search Cases, Case, Attributes • HR HelpDesk, Search Cases, Case, Attributes • Analyst Service Center, Search Cases, Case, Attributes	Add user-defined information to the case.

Entering Attribute Information

Access the Attributes page (Support, Search Cases, Case, Attributes or HelpDesk, Search Cases, Case, Attributes or HR HelpDesk, Search Cases, Case, Attributes or Analyst Service Center, Search Cases, Case, Attributes).



Attributes page

Select or enter the information that you want to add to the case.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Attributes," Understanding Attributes.

Selecting, Printing, and Emailing Case Information

This section provides an overview of print case functionality and discusses how to:

- Select display options.
- Print and email case information.

Understanding the Print Case Functionality

Because certain case data can be considered proprietary information, the PeopleSoft system provides the ability to select or deselect certain fields to display or not display on the Print Case page and in the email attachment.

When the user initiates an email action, the system prepares the attachment behind the scenes and automatically sends it to the attachment server without user intervention. The system formats the attachment to display in an arrangement and style that is very similar to the Print Case output.

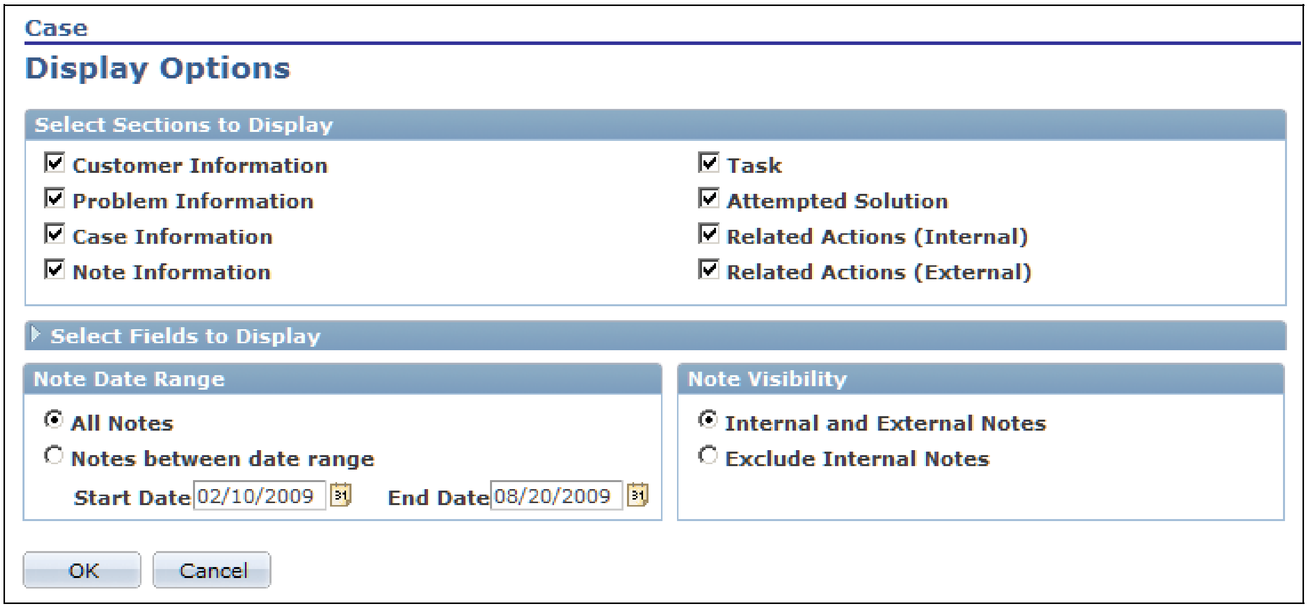
The system saves the attachment, which is in HTML format, with a unique filename on the attachment server associated with correspondence management. The filename that is displayed to the user on the email page is *Case NNNN Details.*

Pages Used to Select, Print and Email Case Information

Page Name	***Definition Name***	***Navigation***	***Usage***
Print Case	RC_CASE_PRINT_VIEW	Click the Print button from the case toolbar.	Print and email case information.
Case - Display Options	RC_PRINT_OPTIONS	Click the Change Display Options link on the Print Case page.	Change print options.

Selecting Display Options

Access the Case - Display Options page (click the Change Display Options link on the Print Case page).



Case - Display Options page

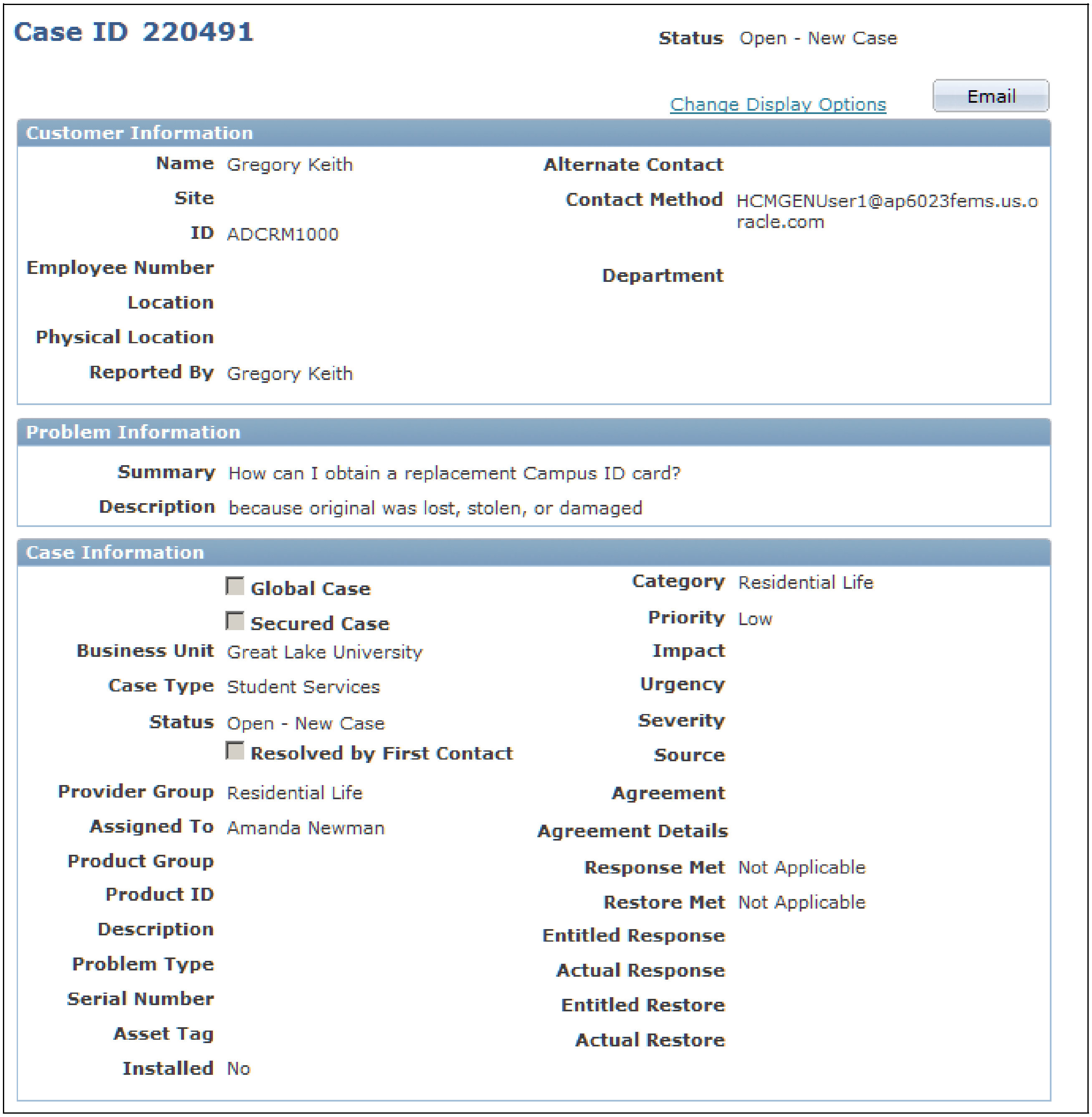
Clear or select the check boxes and radio buttons associated with the information that you want to print or email. Click OK. The system returns you to the Print Case page.

You can only print or email the sections that are listed on the Case - Display Options page. While the following sections are part of the Case component, the PeopleSoft system does not include these sections on the Case - Display Options page and you, therefore, cannot print or email this information using the print case functionality that the PeopleSoft system delivers:

- Related Cases
- Interested Parties
- Attributes
- Case History
- Billing

Printing and Emailing Case Information

Access the Print Case page (click the Print button from the case toolbar).



Case ID 220491

Status Open - New Case

Change Display Options

Email

Customer Information

Name Gregory Keith
Site
ID ADCRM1000
Employee Number
Location
Physical Location
Reported By Gregory Keith
Alternate Contact
Contact Method HCMGENUser1@ap6023fems.us.oracle.com
Department

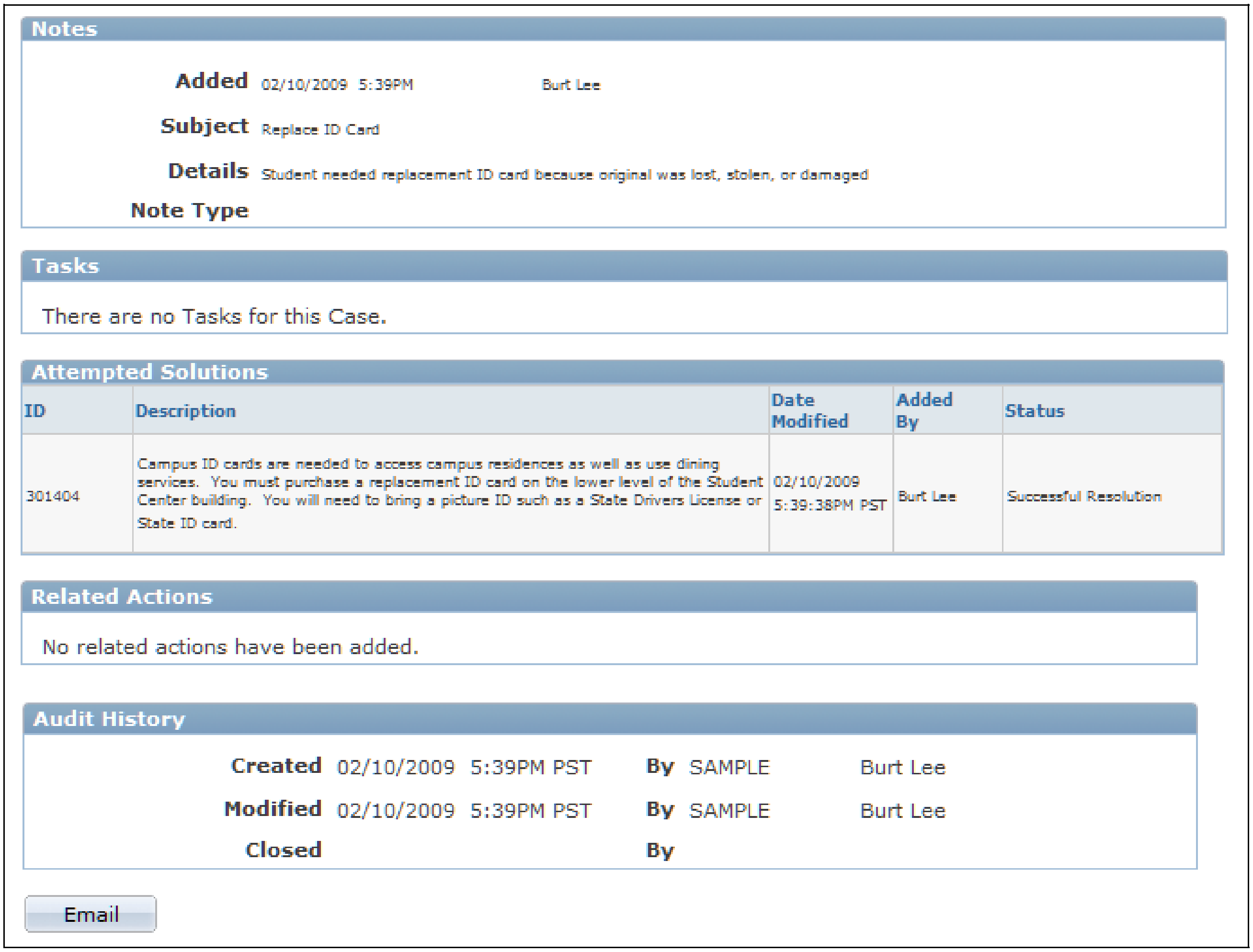
Problem Information

Summary How can I obtain a replacement Campus ID card?
Description because original was lost, stolen, or damaged

Case Information

Global Case
Secured Case
Business Unit Great Lake University
Case Type Student Services
Status Open - New Case
Resolved by First Contact
Provider Group Residential Life
Assigned To Amanda Newman
Product Group
Product ID
Description
Problem Type
Serial Number
Asset Tag
Installed No
Category Residential Life
Priority Low
Impact
Urgency
Severity
Source
Agreement
Agreement Details
Response Met Not Applicable
Restore Met Not Applicable
Entitled Response
Actual Response
Entitled Restore
Actual Restore

Print Case page (1 of 2)



Print Case page (2 of 2)

To print case information, click File, Print, Print from the toolbar on your browser page.

To email case information, click the Email button at either the top or the bottom of the page. The system displays the Outbound Notification page. Any attachments associated with the case will be available on the Outbound Notification page for inclusion with the email.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications," Sending Manual Notifications From CRM Transactions.

Chapter 12

Tracking Time Spent on Cases

This chapter provides an overview of time tracking and discusses how to manage time.

Understanding Time Logs

In PeopleSoft CRM, a time log is automatically generated for every case created in the system. A case time log is prepopulated with the case's assigned agent name and its start date and time.

Time logs are stored in the PeopleSoft database for informational purposes. The time log is referenced in agreement pricing for cases where there is a prepaid agreement for a specified number of hours: the time log is used to decrement the number of remaining hours in the prepaid agreement.

You can design your own reports and processes to leverage the time data captured for each case. PeopleSoft Support and HelpDesk deliver a Crystal report that shows the average time that each support or help desk agent spent to close a case.

Note. If you log time for a task that spans multiple days, it is highly recommended that you enter time reports for each work day (that is, start and end dates are identical), which enables the system to record the exact number of work hours per work day for reporting.

For example, you want to log time for a service activity that you just finished and it lasted three days, from 4 p.m. on June 6 through 10 a.m. on June 8. If you enter the entire period of time in one time-log entry, the system includes the nonwork hours during this time period when it calculates the total number of hours you spent on this task.

In this scenario, June 7 becomes a 24-hour work day even though you actually worked eight hours on that day. To make sure the system captures work hours accurately, log time for each work day that you spend on the task by adding rows to the task's time log.

See Also

Appendix F, "PeopleSoft CRM Call Center Reports," page 583

Managing Time

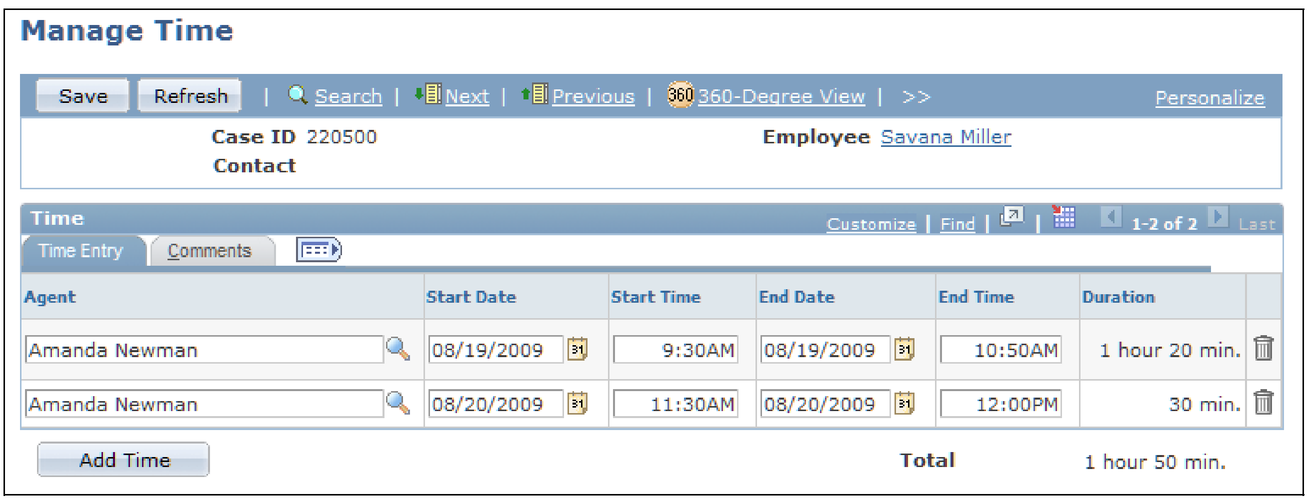
This section discusses how to log time that is spent working on cases.

Page Used to Manage Time

Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Time	RF_TIME	• Support, Time, Manage Time, Manage Time • HelpDesk, Time, Manage Time, Manage Time • Click the Time Entry button on the toolbar of the Case component of PeopleSoft Support, HelpDesk or HelpDesk for Human Resources, or the Issue component of PeopleSoft CRM for Financial Services. The Financial Service Issue is renamed back to Case.	Log the actual period of time spent to complete a case. **Note.** Time entry links can appear under the Support or HelpDesk folder, depending on who is logged in. For example, a help desk agent will see Time under HelpDesk folder.

Logging Time

Access the Manage Time page (Support, Time, Manage Time, Manage Time or HelpDesk, Time, Manage Time, Manage Time or Analyst Service Center, Time, Manage Time, Manage Time).



Manage Time page

Each case is associated with only one system generated time log (each with a unique time report ID). While you cannot manually create time logs, you can, however, add rows within an existing time log. It is useful if a task spans multiple days and you want to report work time on a daily basis.

Agent	Select the worker who spent the time performing the work on the case. For a case time log, the system populates this field with the name of the agent assigned to the case (if available).
Start Date and **Start Time**	Enter the date and time that the work began on the case. The system uses the information in the end date and time fields to calculation duration on the Summary page
End Date and **End Time**	Enter the date and time that the work ended on the case.
Duration	Displays the amount of time the agent entered for that specific row.
Add Time	Click to add a new row that you can use to enter additional time.
Return to Case	Click to return to the associated case

Comments

Enter any comments related to the time that you entered.

See Also

Chapter 10, "Managing Cases," page 241

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Toolbars"

Chapter 13

Managing Credit Card Payments

This chapter provides an overview of credit card processing and discusses how to process credit card payments and review transactions.

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Note. This chapter is relevant to PeopleSoft Support only; PeopleSoft HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education do not incorporate credit card functionality.

Understanding Credit Card Processing

If your organization accepts credit cards in payment for support, you can use the Authorize Credit Card page to manage this process. This page is not available when the case is associated with an agreement where this form of payment (pay for service) is inapplicable.

See *PeopleSoft Enterprise Components for CRM 9.1 PeopleBook*

This section discusses:

- Processing options.
- Credit card transactions.
- Transaction process flow.

Processing Options

Credit card processing depends on whether you use a third-party credit card authorization and payment vendor.

If you entered a merchant ID on the setup page, these conditions occur:

- The Authorize Credit Card page contains a Submit button that agents use to submit transactions.
- The Authorize Credit Card page requires you to enter information that your third-party credit card authorization and payment vendor requires.

If you did not enter the merchant ID, there are no required fields on the Authorize Credit Card page. This page does not have a Submit button. Instead, the page captures information for use with your organization's own solution for processing credit card payments.

Credit Card Transactions

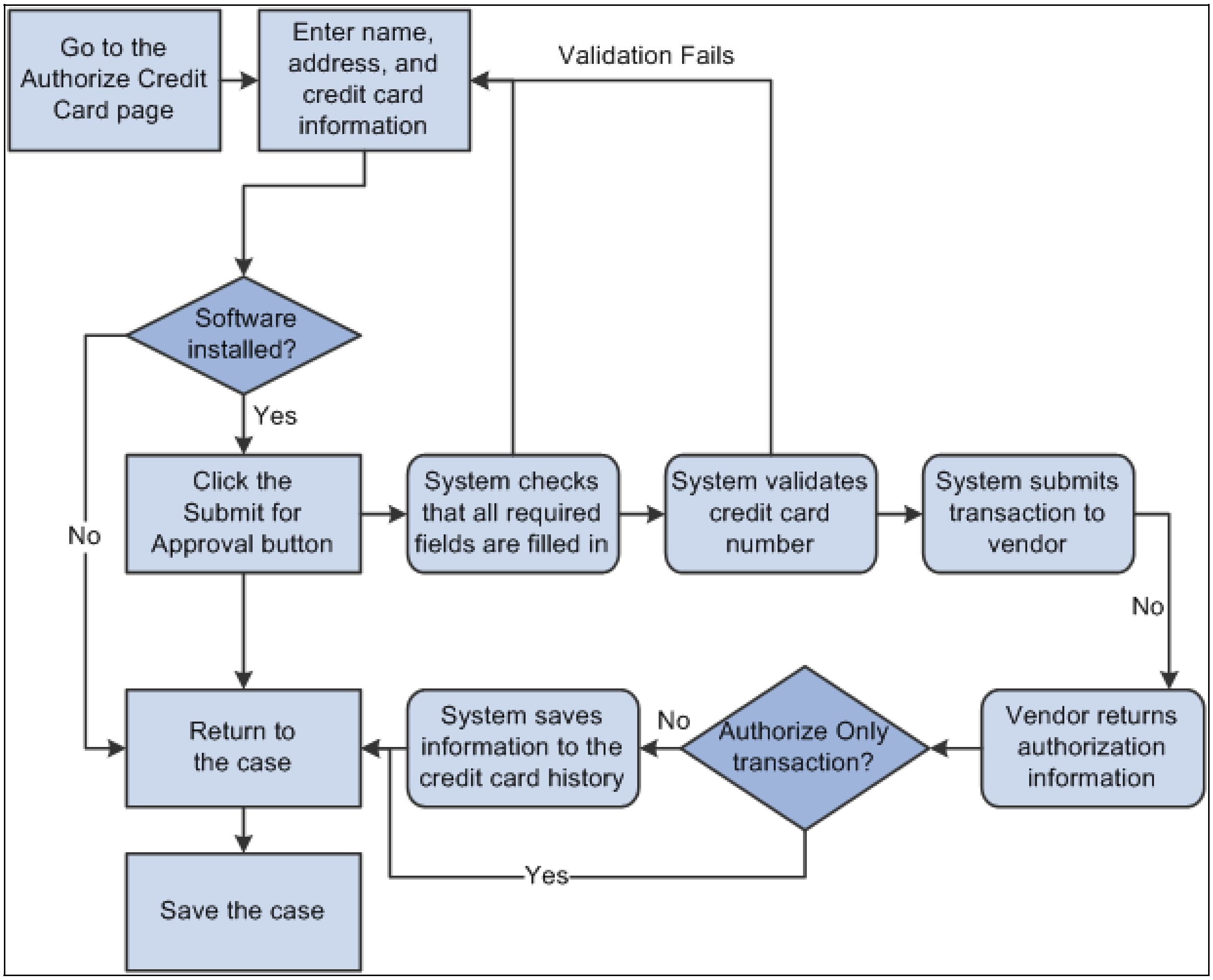
PeopleSoft Support facilitates credit card processing through integration with third-party credit card authorization and payment vendors.

Depending on how your organization has configured your credit card processing, some or all of these transaction options are available:

Transaction Option	***Processing***
Authorize Only	Verifies that the card is valid for the charge (the customer has enough credit to pay for the order, the card is not stolen, and so on). The vendor does *not* bill the credit card.
Bill Only	Bills the card without first verifying that the card is valid for the charge. Select this option if you have preauthorized the transaction and you want to submit the transaction for billing only.
Authorize and Bill	Performs both authorization and billing. The vendor charges the customer's credit card upon receiving authorization.
Credit Only	Credits the customer's credit card.

Transaction Process Flow

This diagram illustrates the credit card transaction process flow. The system performs all credit card validation before submitting data to the vendor, which prevents unnecessary transaction charges.



Credit card processing flow

When the system validates a credit card number, it validates that:

- The credit card number is the correct length.
- The credit card number starts with a valid prefix.
- The credit card number is valid (if the Credit Card Setup page specifies the use of a check digit algorithm).

The system saves the authorization information along with the other transaction information in the credit card history once you manually save the case. This ensures that you have records of any real-time billing or credit transactions.

Processing Credit Cards and Reviewing Transactions

This section discusses how to:

- Submit credit card information for authorization.

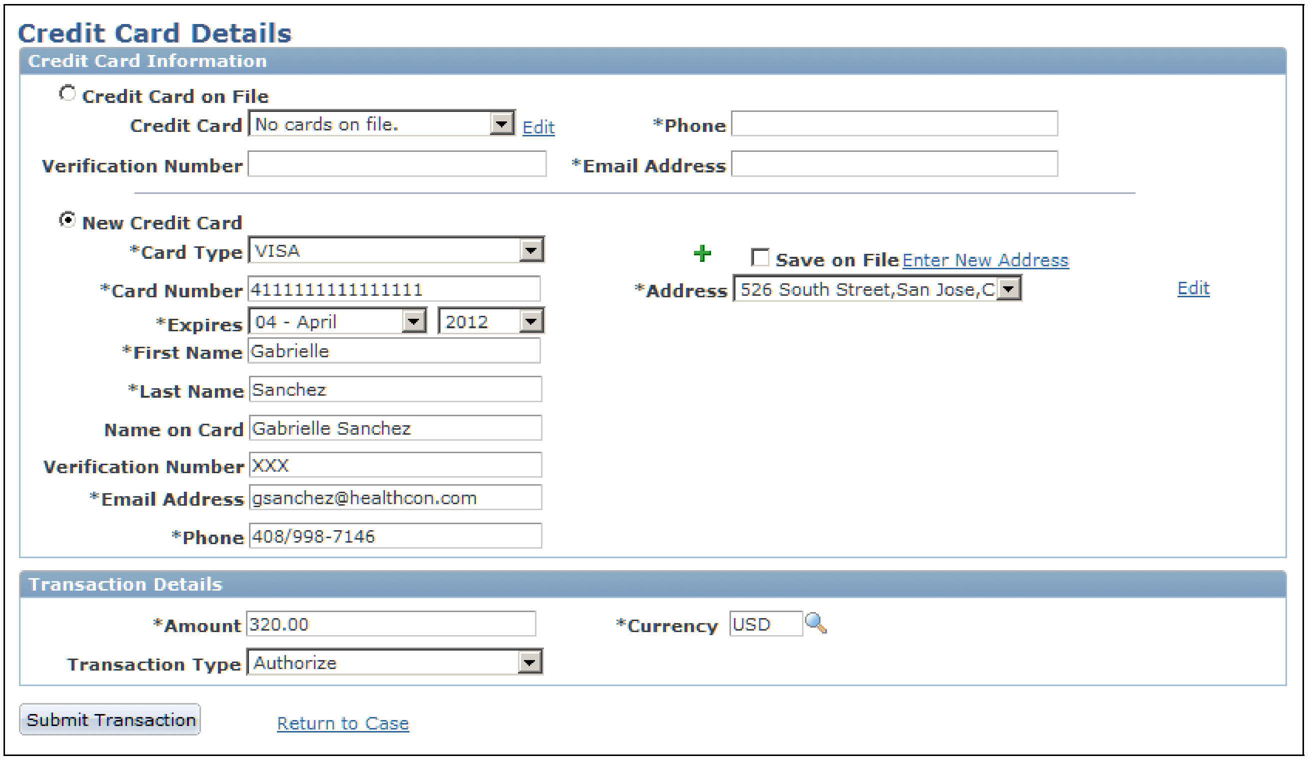
- Review credit card transactions.
- View address details.

Pages Used to Process Credit Cards and Review Transactions

Page Name	***Definition Name***	***Navigation***	***Usage***
Credit Card Information	RC_CASE_CARD_SEC	Support, Add Case, Case Click the Credit Card Information link on the Billing page. Or click Credit Authorization link from Case page [if enabled on display template]	Submit a customer's credit card information for authorization.
Credit Card Information - Transaction Results	RC_CASE_CARD_SEC	Click the Submit Transaction button on the Credit Card Information page.	Review transaction results.
Review Electronic Card History	RB_CARD_HISTORY	Review Electronic Card History, Electronic Card History	Review credit card transactions that have been submitted for authorization.
View Contact Address Detail	RB_CARD_ADDR	Click the Contact Address link on the Review Electronic Card History page.	Review the address information that was used to process the credit card transaction.

Submitting Credit Card Information for Authorization

Access the Credit Card Information page (Support, Add Case, Case, click the Credit Card Information link on the Billing page, or click Credit Authorization link from case page [if enabled on display template]).



Credit Card Information page

This page is also used in the Service Order and Agreement components for credit card authorization purposes.

Note. For security purposes, the credit card number and the verification number are encrypted and stored in the database. After save, only the last 4 digits of the credit card number is shown. As for the verification number, it is masked with XXX, and will be removed permanently from the database after the credit card authorization process completes.

Credit Card Information

This group box displays fields that are generally required by third-party credit card software vendors. All fields are required.

Credit Card on File and **Credit Card**	Select this option if the customer or consumer has a credit card on file. Then select the card that you want to use from the Credit Card drop-down list box.
Phone	Enter the customer's phone number.
Email Address	Enter the customer's email address.
New Credit Card	Select this option if the customer is using a new credit card.
Save on File	Select the check box if you want to save the person's credit card information.

First Name, Last Name and **Name on Card**	Enter this information for the credit card holder. The default name is the name of the consumer or contact who is associated with the case. Change the value if this is not the name on the credit card. Credit card information stored in a person's record (for example, information entered in the Consumer or Contact component) does not appear by default on this page. If, after submitting a credit card charge, you return to this page to authorize additional charges, the information that you previously entered is saved, but the credit card number is masked so that you see only the last four digits. The information is preserved for the current case only. If the same person pays for another case, you must reenter all of the information.
Card Type	Select a credit card type. Values are based on the credit cards that are designated *Active* on the Credit Card Setup page and may include *AMEX, Diners Club/Carte Blanche, Discover, MasterCard,* and *Visa.*
Card Number	Enter the number of the credit card that is to be charged for the transaction.
Expires	Select the credit card expiration date (2-digit month and 4-digit year). **Note.** The *Expires* field (CR_CARD_EXPYR) contains translate values for valid expiration years. You must periodically review and update this field with valid expiration year values. PeopleSoft CRM delivers values that range from 2001 to 2014.
Verification Number	Enter the verification code of the credit card. This field becomes required if the Credit Card Verification Number Required option is selected on the General Options page. After the credit card transaction is submitted and the authorization process is completed (passed or failed), the verification number will be deleted permanently from the system in compliance with the Payment Card Industry (PCI) Security Standards Council recommendations on sensitive data storage.
Email Address and **Phone**	Displays the customer's primary email address and telephone number by default.
Address	Displays the primary address that the system has on file for the person for whom you are executing a credit card transaction. Other addresses that are associated with that person are also available for selection. Confirm that the address is the billing address for the credit card, because address verification is part of the authorization process. The address format is based on the country that you enter. Click the Enter New Address link if you want to add a new address to be used in the transaction. Click the Edit link if you want to update the currently selected address.

Transaction Details

The options that are available depend on how your organization has configured credit card processing.

Amount

Enter the amount that is to be authorized.

Currency Code

Select the currency in which the credit card transaction should be calculated.

Transaction Type

Select one of these values:

Authorize Only: Select to submit the transaction for authorization only. The vendor verifies that the card is valid for the charge and does not bill the credit card.

Authorize and Bill: Select to submit the transaction for authorization and billing. The vendor performs both authorization, and if the charge is authorized, the vendor charges the customer's credit card.

Bill Only: Select if you have preauthorized the transaction and you want to submit the transaction for billing only. The vendor bills the card without verifying that the card is valid for the charge.

Credit Only: Select to submit a credit transaction. The vendor credits the customer's credit card.

Submit Transaction

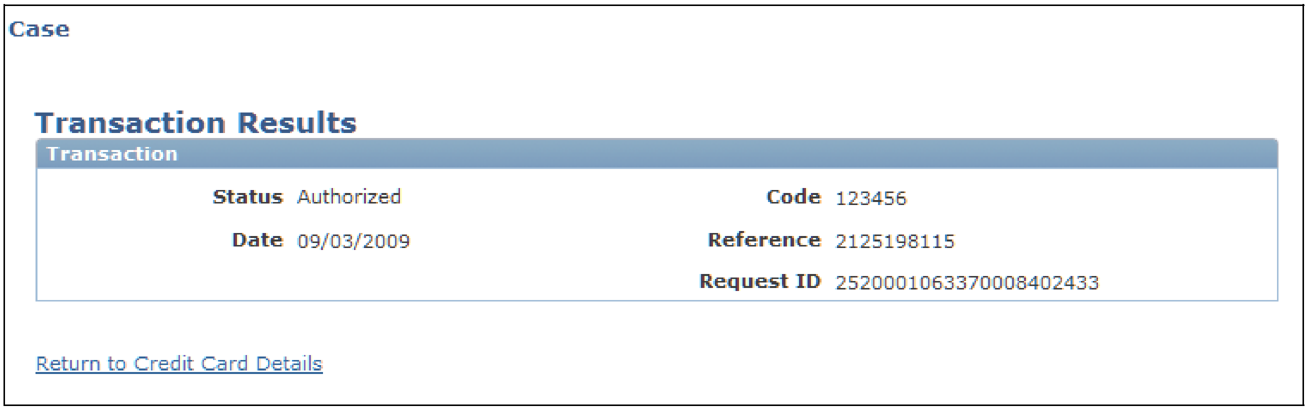
Click to validate all of the data on the page. If the system finds missing or invalid data, the system displays an error message explaining the problem. You must correct all of the errors before the approval process can be initiated.

If all validation criteria are met, clicking this button calls the business interlink. The vendor then performs the authorization, billing, and credit processing that you requested.

Warning! When you submit an authorize and bill, bill only, or credit only transaction, the system saves the transaction information after the vendor returns the information. When you submit an authorize only transaction, you must save your work manually by saving the Case page. If you fail to save, the case results in an incomplete credit card transaction and you will have no record of the completed transaction in your system.

Credit Card Information - Transaction Results

Access the Credit Card Information - Transaction Results page (click the Submit Transaction button on the Credit Card Information page).



Credit Card Information - Transaction Results page

This page displays authorization information for the credit card transaction.

Status

These statuses are examples and may not be suitable for all vendors:

Unprocessed/Retry: Transaction has not been processed or is a failed credit card process and is being resubmitted.

Authorized: Transaction is approved. The funds are reserved for the transaction.

Credited: A credit has been authorized and processed for the transaction. The funds are credited back to the specified credit card.

Denied: Transaction has failed credit card processing and has been declined or disallowed by the company issuing the credit card.

Billed: Transaction is complete. Funds are charged to the credit card. Billed transactions must be preceded by an authorization.

Authorized and Billed: Signifies successful output from the background settlement process.

Manually Approved/Settled: Transaction is approved. Someone contacted the credit card service to obtain verbal approval.

Change to Terms: Payment type has been changed from credit card to payment terms.

Cancel Order: Transaction is cancelled and is not subject to further processing.

Processing: Transaction has been submitted for approval and is awaiting results.

Code (credit card authorization code)

Displays the reference number for an authorized transaction.

Date

Displays the date that the transaction was authorized.

Reference

Displays a message regarding the authorization. For example, if a link is not working, you might see *Interlink Error.*

Return to Credit Card Details	Click to return to the Credit Card Information page. If you return to the case without submitting the transaction, the information still appears on the Credit Card Information page and is saved to the credit card history when you save the case, even though the transaction results fields are blank. To prevent this from happening, you can either clear all data from the Authorize Credit Card page before returning to the case or close the case without saving.

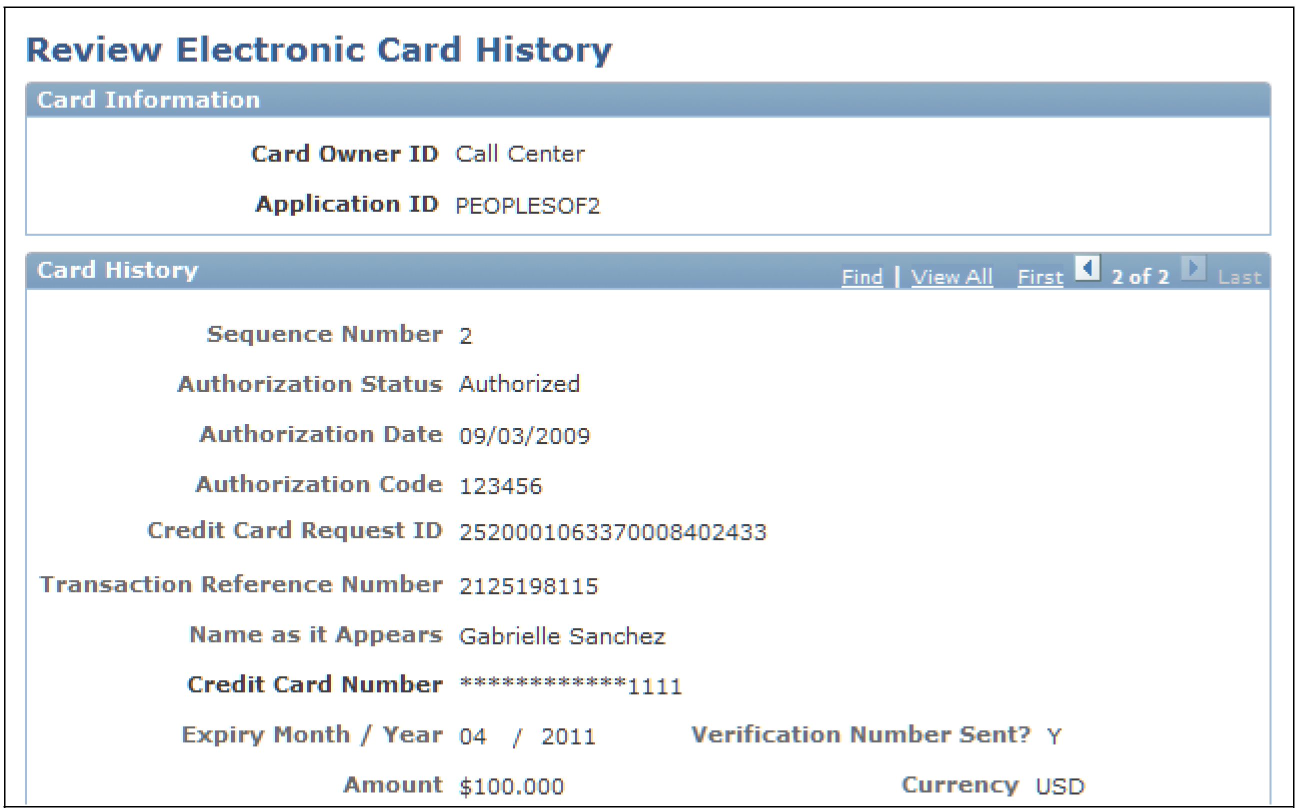
See Also

Chapter 11, "Processing Cases," Recording Billing Information, page 355

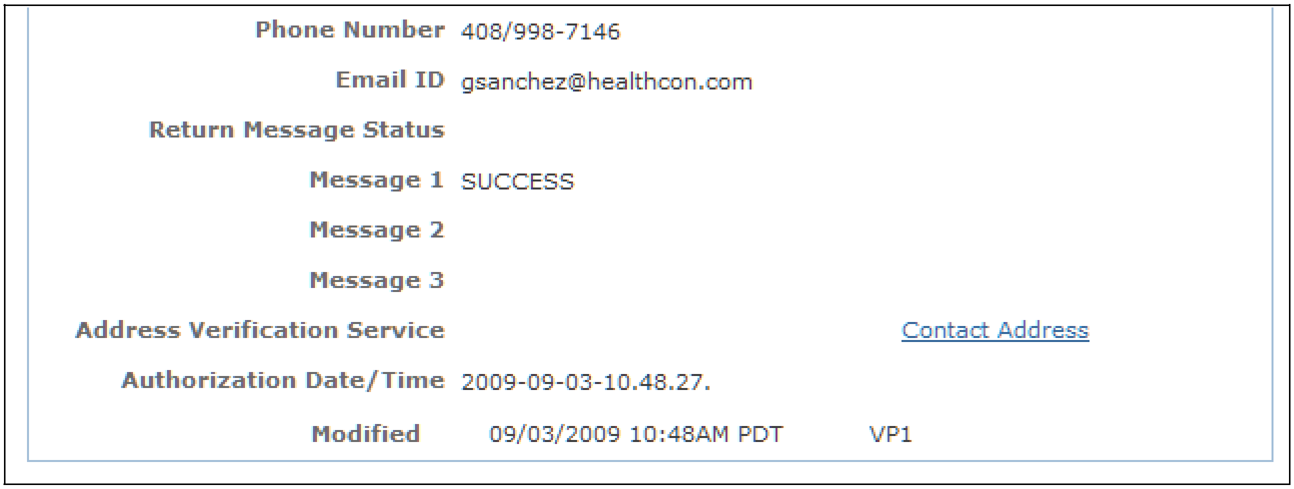
PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Credit Card Encryption," Understanding Credit Card Encryption

Reviewing Credit Card Transactions

Access the Review Electronic Card History page (Review Electronic Card History, Electronic Card History).



Review Electronic Card History page (1 of 2)



Review Electronic Card History page (2 of 2)

Many fields on this page are the same as for the Authorize Credit Card page. Only definitions for fields that do not correspond to similarly named fields on the Authorize Credit Card page are described here.

Card Information

Card Owner ID — Displays the name of the application through which the credit card transaction was processed. PeopleSoft CRM groups credit card transactions by the application from which they originated. Use the Show previous row and Show next row buttons to scroll through the transactions for a specific PeopleSoft CRM application.

Card History

Sequence Number — If multiple credit card transactions are associated with a case, the sequence number differentiates the transactions.

Verification Number Sent — Indicates if a credit card verification number was sent for this credit card transaction. The number is not displayed on this page.

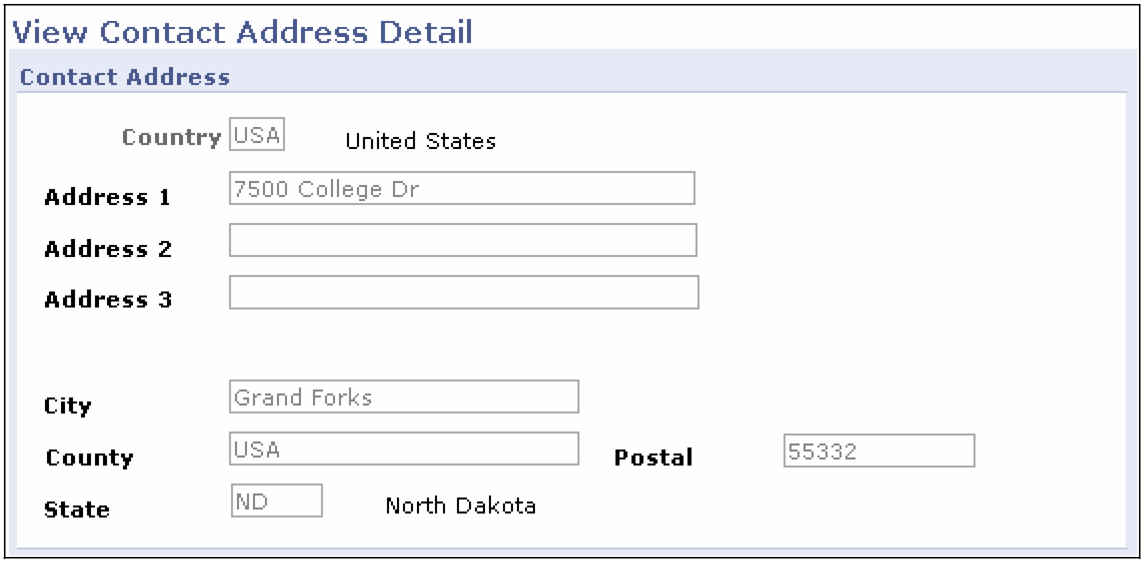
Return Message Status, Message 1, Message 2, and **Message 3** — Displays information regarding your authorization, billing, or credit request.

Address Verification Service — Displays address verification results. An example is *Exact Address Match.*

Contact Address — Click to access the Address Secondary page, where you can review the address information used to process the credit card transaction.

Viewing Address Information

Access the View Contact Address Detail page (click the Contact Address link on the Review Electronic Card History page).



View Contact Address Detail page

Use this page to review the address information used to process the credit card transaction. Click Return to go back to the Review Electronic Card History page.

Chapter 14

Managing Material Returns

This chapter provides an overview of material return processing and discusses how to:

- Set up material return processing.
- Create RMA transactions.

Understanding Material Return Processing

If you integrate PeopleSoft Support with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, call center agents can generate RMAs for customers returning stock for replacement, repair, or stock that was shipped in error.

This section discusses:

- RMA process flows.
- RMA notifications.

We discuss this information in the documentation for understanding requisitions and understanding purchase orders.

See *PeopleSoft Enterprise Purchasing PeopleBook.*

Note. This chapter is relevant to PeopleSoft Support only; PeopleSoft HelpDesk applications do not incorporate RMA functionality.

RMA Process Flows

Agents using PeopleSoft Support can create four types of RMAs:

- Advanced exchange
- Return-and-replace
- Repair-and-return
- Return-to-stock

Basic RMA Processing

Regardless of RMA type, some processing steps are shared by all RMAs that are created in PeopleSoft Support:

1. A customer calls the agent and requests an RMA.

2. The agent opens a new or existing case for the customer and creates an RMA in PeopleSoft Support.

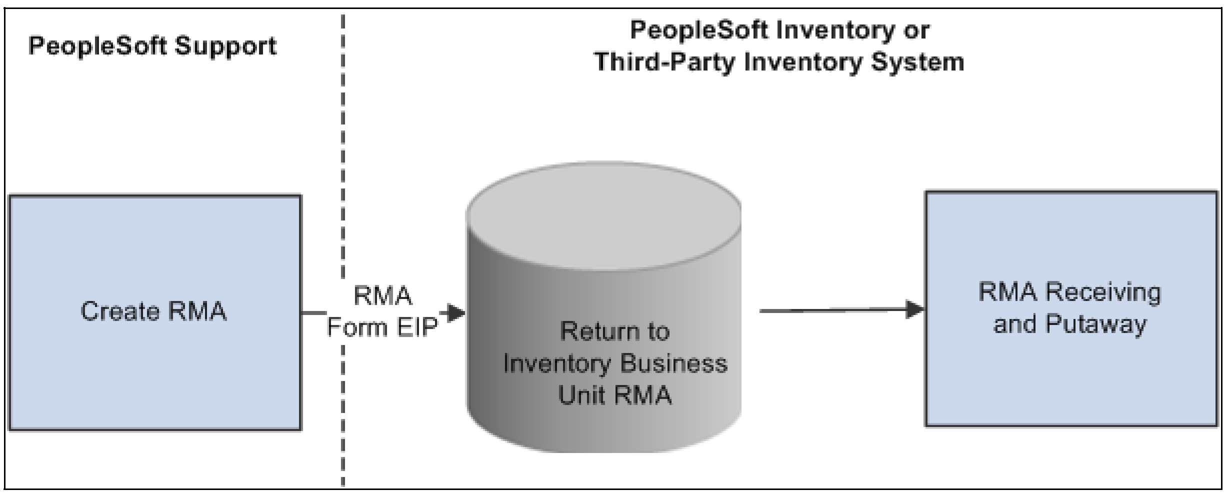
3. When the agent saves the RMA, the system uses the Return Material Authorization EIP (referred to as RMA Form EIP in the diagram) to stage the RMA for processing in the inventory business unit that has been defined on the RMA as the location to send the returned material.

4. The customer physically returns the material to the inventory business unit.

5. In PeopleSoft Inventory, or your third-party inventory system, receipt of the returned material is recorded and the RMA is closed in the inventory system.

   Your inventory system handles the receipt status management for RMAs.

This diagram illustrates the basic RMA processing flow from PeopleSoft Support through PeopleSoft Inventory or a third-party inventory system:



Basic RMA processing flow

We discuss this information in more detail in the Financials/Supply Chain Management documentation for defining general options.

See *PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials).*

Advanced Exchange RMAs

With the advanced exchange RMA type, you can create a replacement order for the customer at the time that you create the RMA. Specify the replacement item or items on the RMA line.

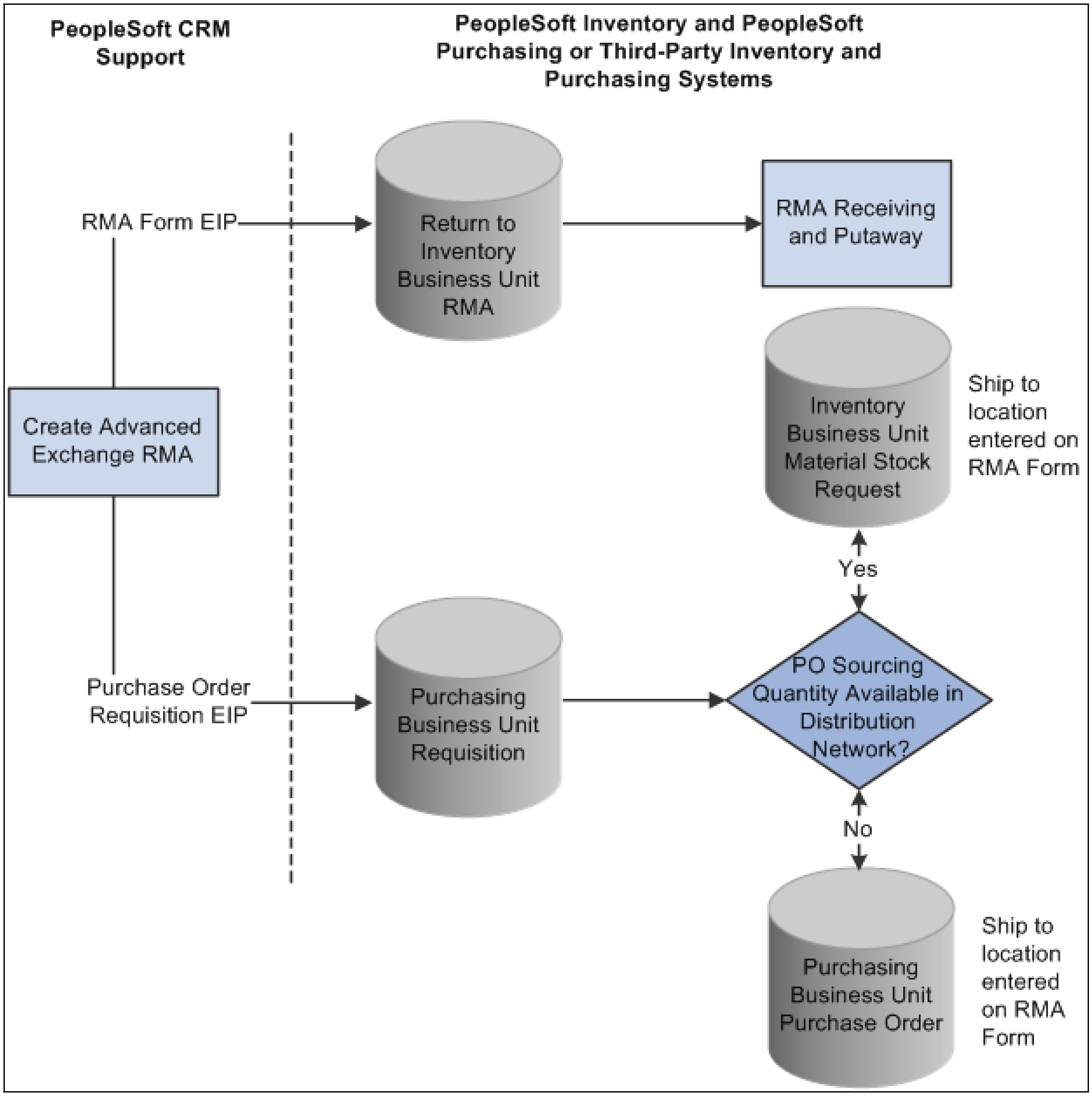
The replacement order can include any of the active items in your system. When you save the RMA form, the system stages the RMA in your inventory system using the Return Material Authorization EIP and creates a requisition request for the replacement order in your purchasing system using the Purchase Order Requisition EIP (referred to as PO Requisition EIP in the diagram).

The system obtains the ship to address for the customer's replacement order from the RMA form.

We discuss this information in more detail in the documentation for enterprise integration points, understanding the EIP catalog.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Testing Utilities and Tools*

This diagram illustrates the advanced exchange RMA processing flow:



Advanced exchange RMA processing flow

The Purchase Order Requisition EIP enables you to requisition a replacement for the customer at the time that the advanced exchange RMA is created.

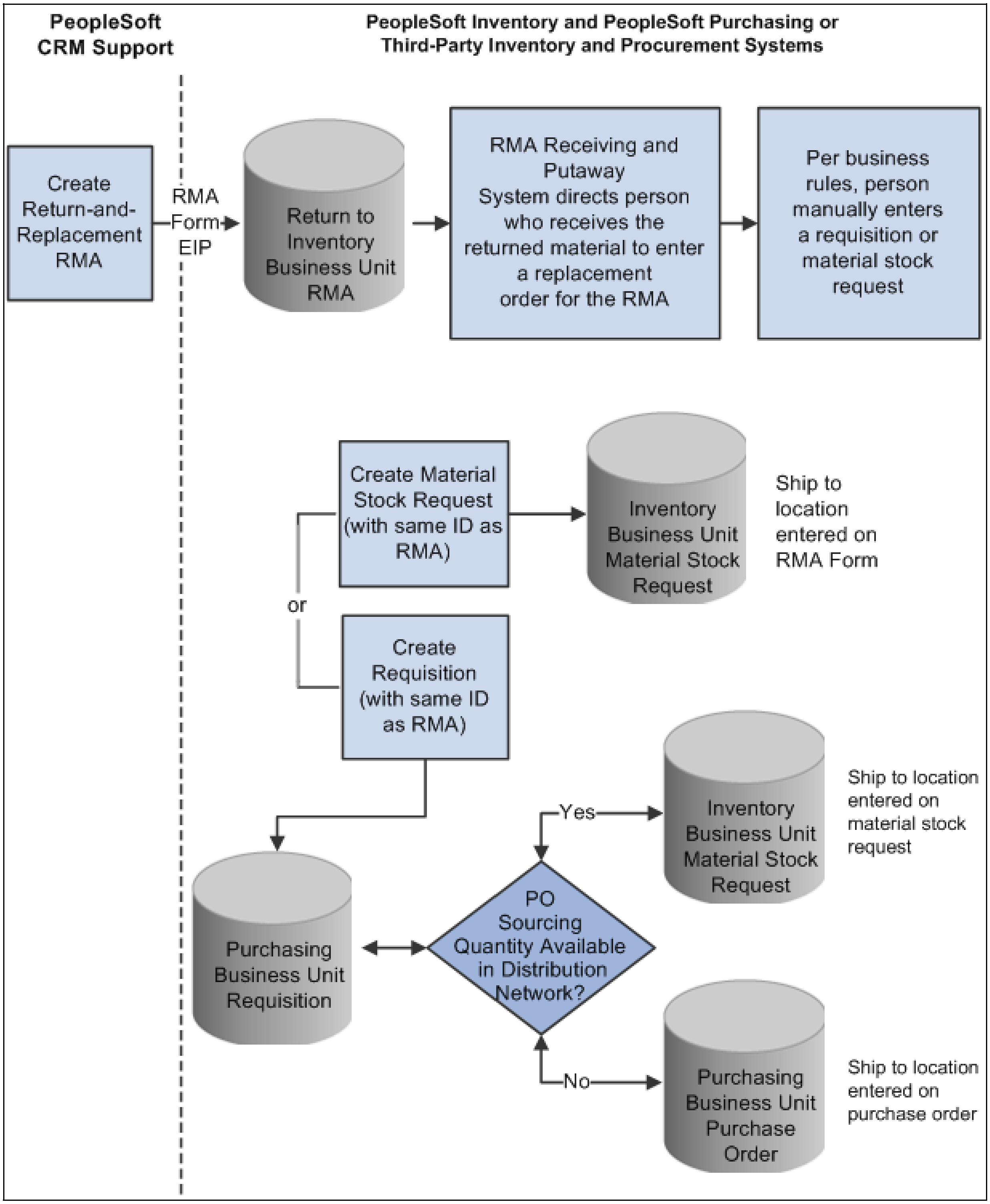
Note. PeopleSoft Purchasing, or your third-party purchasing system, handles the processing of the requisitions that are staged by the Purchase Order Requisition EIP. In your purchasing system, you must set processing defaults for the staged requisitions and perform any required actions to complete the ordering process.

Return-and-Replace RMAs

Unlike the advanced exchange RMA, orders for return-and-replace RMAs are not created until the returned material has been physically received in the location specified as the return-to business unit. Follow these steps to process a return-and-replace RMA:

1. When a person records receipt of material on a return-and-replace RMA in your inventory system, the inventory system displays a message indicating that a replacement order is required.
2. Depending on your business process rules, the person manually enters a material stock request in your inventory system or a requisition in your purchasing system to replace the customer's returned material.
3. The person receiving the returned material uses the information on the RMA, such as the customer's address, information about the item, and quantity returned, to create the replacement order.
4. To facilitate tracking of the replacement order in your inventory or purchasing systems, the same ID as the RMA should be used when the person manually creates replacement requisitions or material stock requests.

This diagram illustrates the return-and-replace RMA processing flow:



Return-and-replace RMA processing flow

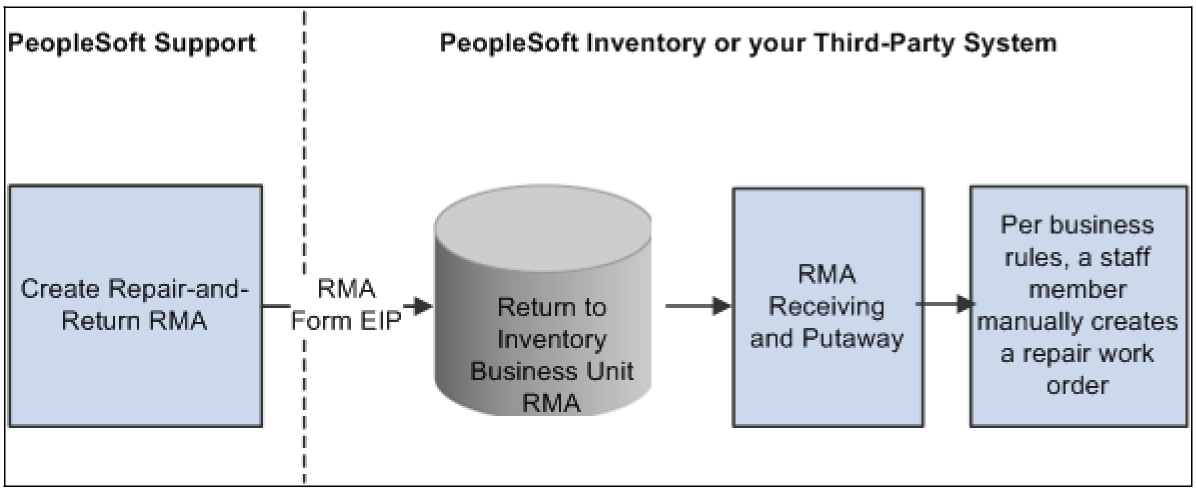
For return-and-replace RMAs, replacement orders are manually created in your inventory or purchasing systems after the returned material has been physically received from the customer.

Repair-and-Return RMAs

You create repair-and-return RMAs when a customer sends an item back to you for repair. As delivered, PeopleSoft CRM does not offer repair depot functions. However, if your business includes repair services, you can use the repair-and-return RMA option in conjunction with your business process rules. The repair-and-return RMA processing is similar to return-and-replace RMA processing:

1. A person creates an RMA for a customer in the specified return-to business unit in your inventory system.
2. A staff member, in the facility where the item needing repairs is sent, records the receipt of the RMA in your inventory system.
3. The staff member creates a work order for the repairs, according to your business rules, and delivers the item to the appropriate staff for repair work.
4. The work order should include the ship to address for the customer who appears on the RMA form and the RMA number (to facilitate RMA tracking across your enterprise).
5. The material is shipped back to the customer using the address information from the RMA when the repair work is complete.

This diagram illustrates the repair-and-return RMA processing flow:



Repair-and-return RMA processing flow

For repair-and-return RMAs, repair work orders are manually created per your business rules when the returned material is physically received from the customer.

Return-to-Stock RMAs

You create a return-to-stock RMA for a customer who is returning material with no need for a replacement. Typically, the customer has received the wrong shipment or been shipped too much quantity. The process flow for a return-to-stock RMA is identical to the basic RMA processing flow.

We discuss this information in more detail in the documentation for receiving and putting away stock and transferring stock between business units.

See *PeopleSoft Enterprise Inventory PeopleBook.*

Note. You can create RMAs for customers who return stock for orders that they placed but then changed their minds about the order at the time of receipt. For billing purposes, use the RMA processes of your order management system to handle these cases.

RMA Notifications

As delivered, PeopleSoft Support offers the RMA receipt notification workflow. You can use this workflow to notify the receiving manager and receiving agent when an RMA shipment is expected from a customer. Once the workflow is set up, the system sends your receiving managers and receiving agents a notification each time that a new RMA is saved in PeopleSoft Support.

RMA Receipt Workflow Notifications Setup

To enable RMA notifications, you must define people in your system with receiving manager and receiving agent roles and establish their routing preferences and email addresses.

To set up RMA notification workflow:

1. Assign the receiving manager and receiving agent roles to the appropriate employees in your system.

   When an RMA is created, the receiving managers and receiving agents receive notification that a receipt for returned material is expected. You associate the receiving manager or receiving agent role to a person in your system on the Roles page under User Profiles.

   We discuss this procedure in the documentation for setting up user profiles.

2. Define notification routing preferences for the people assigned the receiving manager and receiving agent roles.

   When an RMA is created, the notification is published as a worklist entry, an email, or both, depending on the routing preferences defined for the group member on the Workflow page accessible through User Profiles. On that page, indicate whether the person is a worklist user, an email user, or both.

   Note. Note that if you select both the Worklist User and Email User check boxes for the person, two notices—an email and a worklist entry—are published each time the workflow process is triggered for an RMA that is created. Define an email address for each person with an email notification preference.

3. Define valid email addresses for the people who receive email notifications.

   For each person with an email routing preference for RMA notifications, define a primary email address in the Worker component.

   Note. Person IDs defined for the worker are associated with user IDs on the User Profile page under Workforce, Search Worker or the User Profile component under PeopleTools, Security, User Profiles. For workflow notifications to work as designed, link each person in your system to one user ID only.

4. (Optional) Associate worklist groups with the people who are assigned receiving manager and receiving agent roles.

   When an RMA is created, a worklist entry can be created for the worklist group that is established for the people who are assigned receiving manager and receiving agent roles in your system. A worklist group must first be defined on the Group Worklist Setup page.

See Also

Enterprise PeopleTools 8.50 PeopleBook: Security Administration

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Workers," Pages Used to Maintain Worker Information

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Setting Up and Using Worklists," Defining Group Worklists

Setting Up Material Return Processing

Successful implementation of the RMA creation functionality depends on several setup steps:

1. Define inventory business units.

   Define business units in your inventory system that represent the warehouses that are to receive returned material. Activate the Business Unit EIP to insert the business units that are defined in your inventory system in the BUSINESS_UNIT_FS table in the PeopleSoft CRM system automatically. This enables you to select the appropriate inventory business unit on the RMA Form.

   We discuss this procedure in more detail in the documentation for transferring stock between business units.

   See *PeopleSoft Enterprise Inventory PeopleBook.*

2. Synchronize item, product, and customer masters between PeopleSoft CRM and your purchasing and inventory systems.

   Activate the Item Master EIP, the Product EIP, and the Customer EIP to populate your PeopleSoft CRM tables with the master data in your inventory and purchasing systems. Alternatively, you can manually enter item, product, and customer information in both PeopleSoft CRM and your inventory system.

3. Define requisition processing defaults in your purchasing system.

   Call center business units in PeopleSoft CRM that can create RMAs must be defined as a valid source of requisitions in your purchasing system. If you are integrating with PeopleSoft Purchasing, use the Requisition Loader Defaults component in PeopleSoft Supply Chain Management to define each call center business unit as a Loader BU. Using the same component, establish processing defaults for requisitions that are staged by the call center business unit, including the purchasing business unit in PeopleSoft Purchasing that is used to process the requisitions.

   When you define procurement options in PeopleSoft Supply Chain Management, you can associate the call center business unit with an appropriate distribution network on the Ship To Locations page. You can configure sourcing processes in PeopleSoft Purchasing to verify the available quantity in the distribution network before creating a purchase order with an external vendor. If the quantity exists in one of the inventory business units in the defined distribution network, the system creates a material stock request to fulfill the requisition.

   See *PeopleSoft Enterprise Application Fundamentals PeopleBook (Financials)*

4. Define requesters in PeopleSoft CRM and your purchasing system.

   The requester ID represents a person or an entity that initiates a requisition request. For advanced exchange RMA lines, the system populates the Requester field with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID as necessary. However, if you integrate with PeopleSoft Purchasing, the requester ID that you select for the RMA line created in PeopleSoft Support must be a valid user ID and requisition requester in PeopleSoft Purchasing.

5. Activate the associated service operation queues.

   In your PeopleSoft Support and Inventory systems, activate the Return Material Authorization service operation. For advanced exchange RMAs, activate the Purchase Order Requisition service operation in PeopleSoft Support and in your purchasing system.

6. Define problem codes in PeopleSoft CRM and reason codes in PeopleSoft Inventory.

   When you create an RMA in PeopleSoft Support, you must specify a problem code. You set up problem codes for RMAs on the Problem Codes page under Set Up CRM, Common Definitions, Codes and Auto Numbering, Problem Codes. If you are integrating with PeopleSoft Inventory, the problem codes that you select for RMAs in PeopleSoft Support must match the reason codes that are established on the Reason Code page in PeopleSoft Inventory. Also, the matching reason codes in PeopleSoft Inventory must be defined with a reason type of *Return Material Authorization.* When the RMA form is created in PeopleSoft Inventory, the problem code is used as the reason code. If the reason code on the RMA form does not exist in PeopleSoft Inventory, the system logs an error when the RMA service operation is processed.

7. Create a case for a customer.

   Create a case using the Case component in PeopleSoft Support. RMAs must be associated with a case in your system. You cannot create an RMA without first creating a case.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15

Chapter 10, "Managing Cases," page 241

PeopleSoft Enterprise Integrated FieldService 9.1 PeopleBook, "Integrating with PeopleSoft Applications"

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Defining Items"

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Setting Up Products"

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Understanding Business Object Relationship Model Components"

Creating RMA Transactions

This section discusses how to:

- Create and view an RMA transaction.

- View the installed product hierarchy.
- Add notes.

If PeopleSoft Support is integrated with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, you can create RMAs for customer returns using the pages in the RMA Form component or the Related Actions page in cases. You must save a case to save an RMA. Typically, an RMA is created from a case.

See Also

Chapter 11, "Processing Cases," Managing Related Actions, page 333

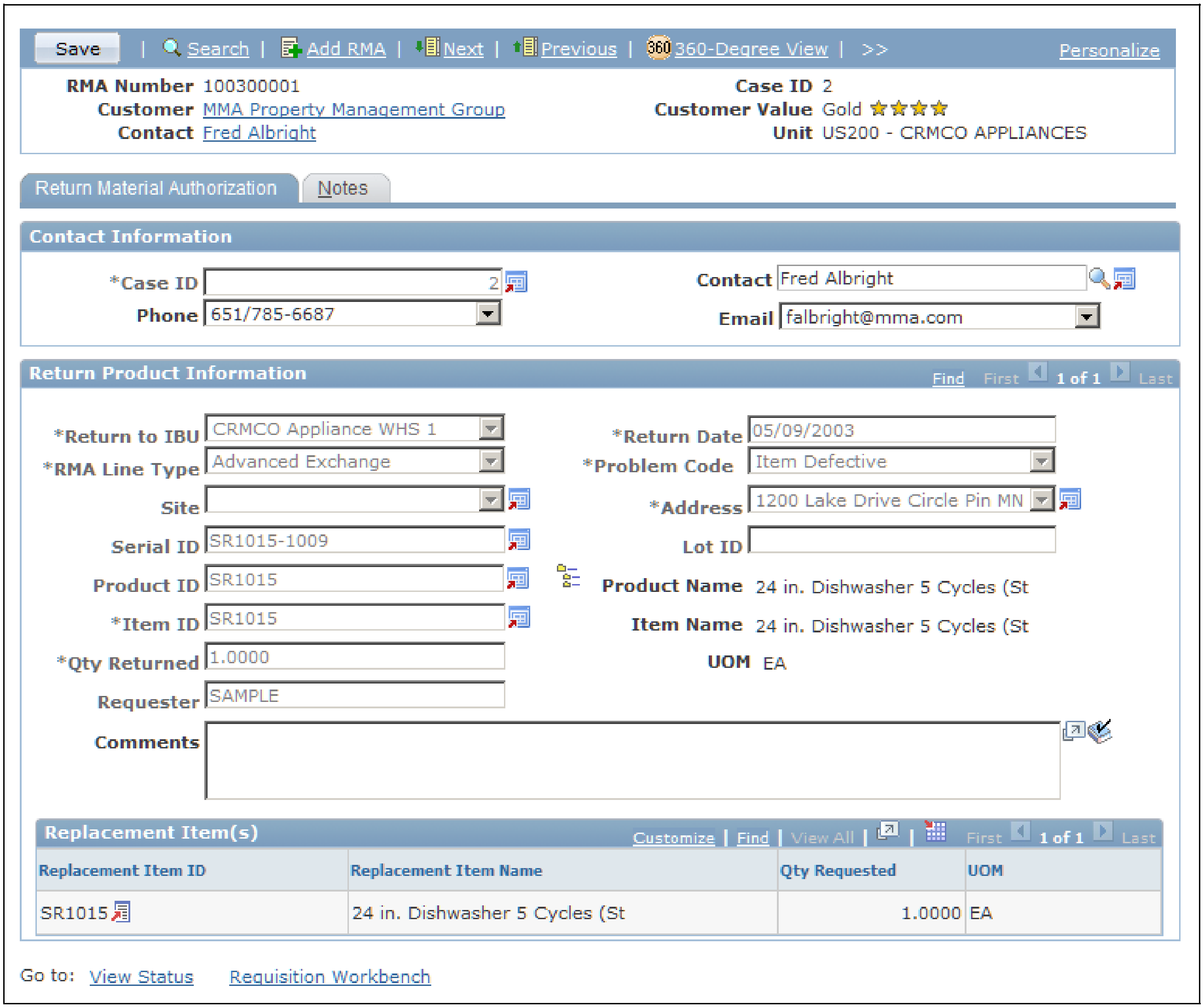
PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products"

Pages Used to Create RMA Transactions

Page Name	***Definition Name***	***Navigation***	***Usage***
Return Material Authorization	RF_RMA_HDR	Support, Returns Support, Add Case Select Create RMA from the Related Action drop-down list box and click the Go button.	Create and view RMA transactions.
Returns - Installed Product Hierarchy	RF_INSTPROD_VH_SEC	Click the View Inst Product Hierarchy button on the Return Material Authorization page.	View the installed product hierarchy for the specified customer.
Return Material Authorization - Notes	RF_RMA_NOTE	Select the Notes page on the Return Material Authorization component.	Record comments and attach files that are related to an RMA.

Creating and Viewing an RMA Transaction

Access the Return Material Authorization page (Support, Returns).



Return Material Authorization page

If your implementation includes PeopleSoft Inventory, and you logged in to the portal using the single sign-on feature, you can click the View Status link to access the RMA Form page in PeopleSoft Inventory. The View Status link is disabled in Add mode. Similarly, the Requisition Workbench link appears if your implementation includes PeopleSoft Purchasing, and you logged in to the portal using the single sign-on feature. This link is active only in Update/Display mode when at least one RMA line has the RMA type *Advanced Exchange.* The Requisition Workbench link is disabled in Add mode.

RMA Number	Displays *Next* until you click Save. Then the system issues the RMA a number.
Case ID	The unique identifier of a case.

Customer

Displays the name of the customer who is returning the material. The customer name is populated from the case and cannot be changed. Customer records are established in your system using the Add Company or Search Company components under Customers CRM.

Note. Before you create and save an RMA, a case must be created and a ship-to role must be defined for the customer defined on that case.

Customer Value

If you have purchased PeopleSoft Enterprise Strategic Account Management, this indicator reflects the standing of the customer within your organization's customer portfolio.

Contact

The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value.

Note. A contact is required if the specified customer is a company, but optional if the customer is a consumer.

Unit

Displays the business unit that is associated with the RMA.

Contact Information

This section displays information about the customer who is returning the material:

Case ID

The unique identifier of a case. When you create a new RMA, you must specify an existing case ID before you save the RMA. You cannot change the Case ID on an existing RMA.

Phone

Select the phone number that is associated with the contact or customer.

Contact

Enter the name of the person who requested the RMA on behalf of the customer. The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value.

Note. A contact is required if the specified customer is a company, but optional if the customer is a consumer.

Email

From the Email drop-down list box, select an email address that is associated with the customer, contact, or site.

Return Product Information

This section provides default information for each RMA line that you add. You can modify the information that is defined using these fields for each RMA line.

If you choose *Return to Stock* for the RMA Line Type field, at the top of the page or click the Add Return Product button, the system displays information about the product being returned to stock. If you do this, enter the appropriate information in these fields.

Delete

Click this button to delete the row of data that is displayed.

Return To IBU (return to inventory business unit)

Select the inventory business unit where the customer ships the returned material. In PeopleSoft Support, a default value for this field is specified for the call center business unit on the Call Center BU page. If PeopleSoft Inventory is installed, this is a PeopleSoft Inventory business unit.

RMA Line Type

Displays the type of processing that is used for the returned material. Values are:

Advanced Exchange: Immediately creates a replacement order for the item that the customer is returning. The replacement order can be for the same item or for a different item. You can specify the replacement in the Replacement Item(s) grid. The system populates the replacement item and requested quantity using the values defined for the return item and returned quantity.

Repair and Return: The customer is returning an item for repair.

Return and Replace: The item that the customer is returning must be received before a replacement order can be created.

Return to Stock: The customer is returning material that was originally requested on a case that was not needed.

Site

Displays the identification of the customer site from which material is being returned.

Serial ID

Displays the serial number or ship-serial number of the item that the customer is returning. If the item is serial-controlled, a serial number is required for the RMA. If necessary, a different serial number can be entered at the time of receipt. Ship-serial IDs are optional for ship-serial-controlled items.

Note. If you enter a value for an item that is not serial controlled or ship-serial controlled in your system, the value is removed when you save the information.

Product ID and **Product Name**

Displays the identification information for the product that the customer is returning.

Note. If more than one installed product record for an item ID, serial number, or product is found, the system displays the Installed Product List page, where you can select the applicable installed product record.

Item ID and **Item Name**

Displays the identification of the item that the customer is returning.

Qty Returned (quantity returned)

Displays the amount of the item that the customer is returning. For serial-controlled items, this quantity must be *1*.

Requester

Displays the ID of the person or entity that is associated with the requisition request. The system populates this value with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID, as necessary. If you have implemented PeopleSoft Purchasing, you can use the requester ID to view the status of all the requisitions that have been entered by a specific person using the Requisition Workbench.

We discuss this procedure in the documentation for reviewing requisition information.

PeopleSoft Enterprise Purchasing PeopleBook.

Important! If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management under Structure Procurement Options.

Comments

Enter notes about the RMA (optional).

Return Date

Displays the date that the returned item is expected to be received at the inventory business unit defined as the Return To IBU. When you add a new RMA, you can specify an estimated return date for informational purposes only. The current date is the default value for this field.

Problem Code

Select the entry that best describes the problem you are having with the product.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Problem Codes for Material Returns, page 82.

Address

Displays the ship-to address that is specified for the customer or customer site. The system populates primary ship to address that is defined for the site, if entered, or the primary ship-to address that is defined for the customer.

Displays the address associated with one of the ship-to addresses specified for the customer or customer site. When entering a new RMA, click the Override Address link to modify the address on the RMA Header Return From Address page. When viewing an existing RMA, click the Display Address link to view the address information.

Lot ID

Displays the lot number of the item that the customer is returning. Lot IDs are optional for lot-controlled items.

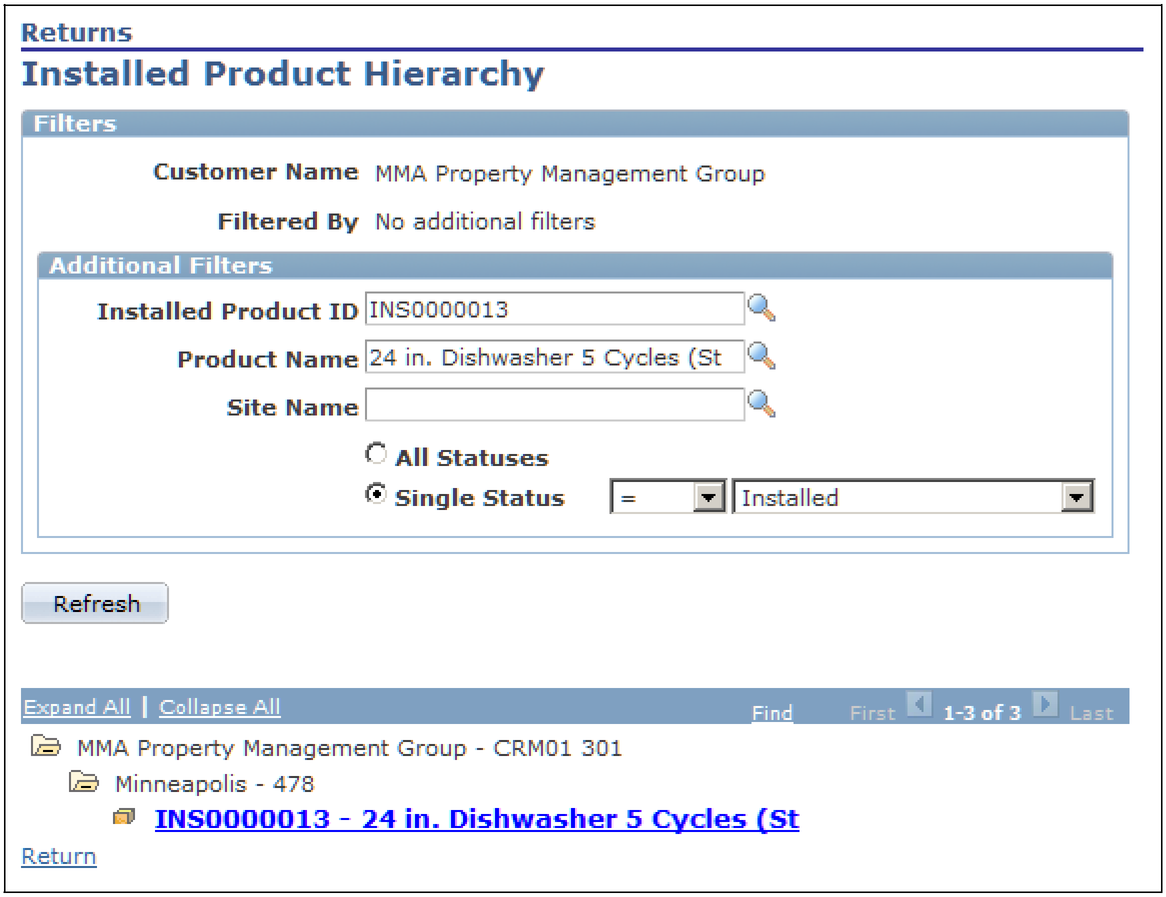
Note. If a value is entered for an item that is not lot-controlled in your system, the value is removed when you save the information.

UOM (unit of measure)

Displays the unit by which the replacement item is measured. In most cases this will be EA for each.

Viewing the Installed Product Hierarchy

Access the Returns - Installed Product Hierarchy page (click the View Inst Product Hierarchy button on the Return Material Authorization page).

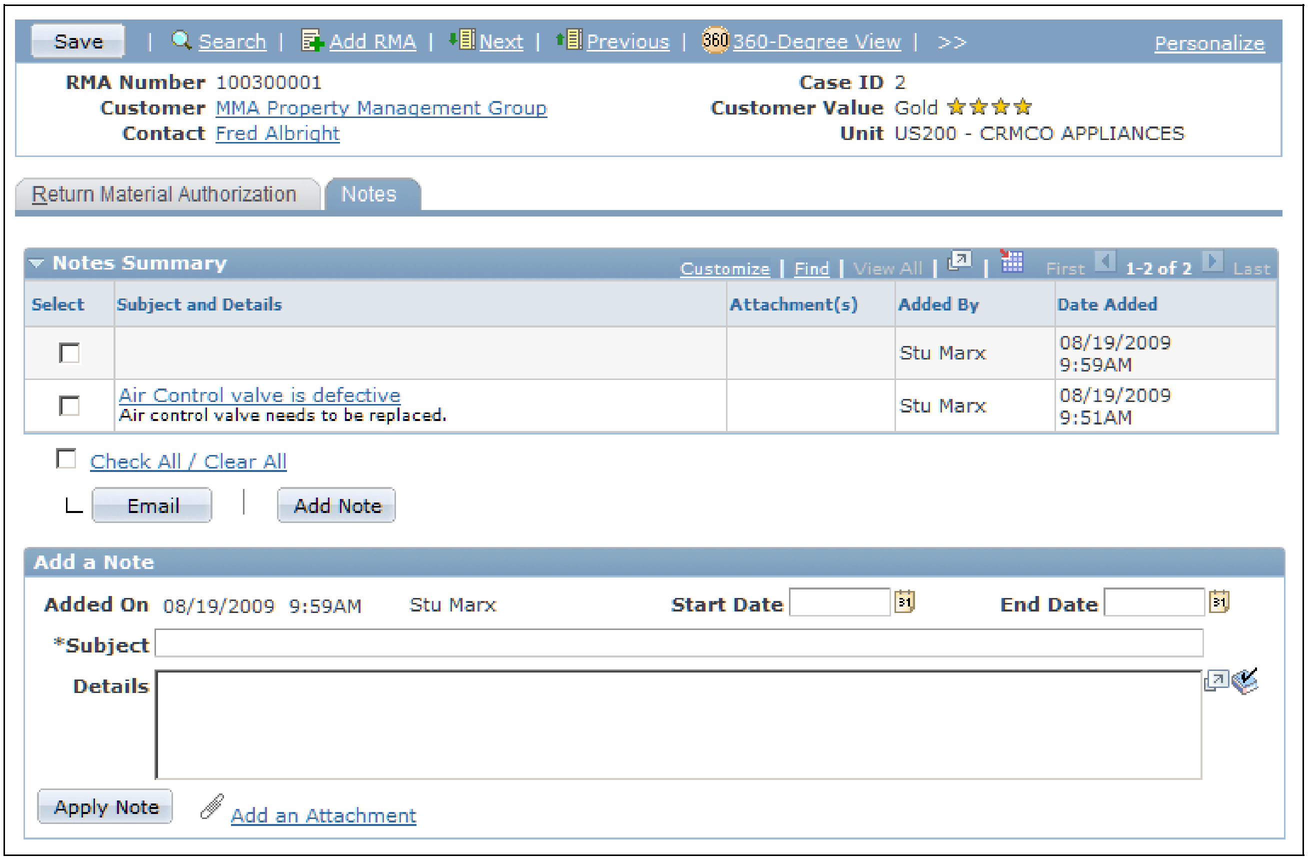


Returns - Installed Product Hierarchy page

See *PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook*, "Tracking Installed Products," Viewing Installed Product Hierarchies.

Adding Notes

Access the Return Material Authorization - Notes page (select the Notes page on the Return Material Authorization component).



Return Material Authorization - Notes page

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Chapter 15

Managing Assets

This chapter provides an overview of asset management, lists prerequisites, lists common elements, and discusses how to:

- Manage assets from the Case page in PeopleSoft HelpDesk.
- Add and reconcile installed assets.

Note. This chapter is relevant only to PeopleSoft HelpDesk; PeopleSoft Support and HelpDesk for Human Resources do not incorporate asset management functionality into their applications.

Understanding Asset Management

This section discusses:

- Asset management functionality.
- Asset related actions.
- Link definition setup.

Asset Management Functionality

Asset management provides organizations with the ability to gather information about the hardware and software that is used over their network. The system can also detect the location of personal computers on the network.

Asset management offers these benefits:

- Provides foundation data for effective troubleshooting.
- Facilitates planning for upgrades.
- Helps control the total cost of ownership.
- Helps to accurately determine how much has been invested on a client system.
- Increases company control and security.

Note. PeopleSoft Helpdesk does not currently provide any mechanisms to detect hardware and software assets from within the PeopleSoft CRM applications. You must integrate with a third-party application for asset discovery or remote control of technology assets.

Asset Related Actions

After you set up an integration with a third-party asset management system, agents can perform these functions from the Case page or Case toolbar in PeopleSoft HelpDesk:

- Asset Administrator

  Execute web administrator actions.

- Asset Summary

  Run an ad hoc asset discovery process to verify configuration details of a specific asset.

- Remote Control

  Execute a remote control process so a help desk agent can remotely take control of an employee's desktop to resolve a problem.

- Software Delivery

  Perform software delivery related actions

Link Definition Setup

The PeopleSoft system delivers four link definitions that appear on the Case page in the Related Action drop-down list box:

- Asset Administrator
- Asset Summary
- Remote Control
- Software Delivery

Portal Crefs (content references) are set up on the Content Ref Administration page in PeopleSoft PeopleTools (select PeopleTools, Portal, Structure and Content, Hidden Crefs. Then click *Asset Administrator, Asset Summary, Remote Control, or Software Delivery*.

Link definitions are set up in PeopleSoft CRM on the Link Definition page (select Set Up CRM, Product Related, Call Center, Link Definition). Click the RELA (related actions) category.

On the Link Definition page, the Field Name in the Search Keys grid is set to *cfResourceIdentifier*.

Additionally, the PeopleSoft system selected the Solvable check boxes for all four link definitions. However, the Self-Service check boxes are not selected for any of the link definitions. The term *Serial Number* is associated with three link definitions (Asset Summary, Asset Administrator, and Remote Control).

At runtime, the system resolves the *Serial Number* term and adds it to the URL string. For example, the Asset Summary related action generates this URL: http://209.17.27.128/<path to third party asset system>&cfResourceIdentifier=2UB234345

Note. You may need to update the Portal CREF information to point to the correct URL based on your environment.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleTools Portal Technology, "Administering Portals"

Chapter 5, "Setting Up Links and Related Actions," page 99

Prerequisites

Before you can access your asset management application from PeopleSoft HelpDesk, you must:

- Install a third-party asset management application.
- Install the third-party software on the computers that need to be discovered.
- Install the third-party remote control software on the computers that need to be remotely controlled.

Note. Refer to your third-party vendor's documentation or ask your consultant for advice on setting up an integration with PeopleSoft CRM.

Common Elements Used in This PeopleBook Chapter

This section discusses common elements used in this chapter.

Terms

These terms are used throughout this chapter:

Asset	Any technology device, such as a computer, peripheral, or router.
Remote Control	The ability to remotely take control of a computer system.
ITAM	Information Technology Asset Management.

Managing Assets from the Case Page in PeopleSoft HelpDesk

This section discusses how to:

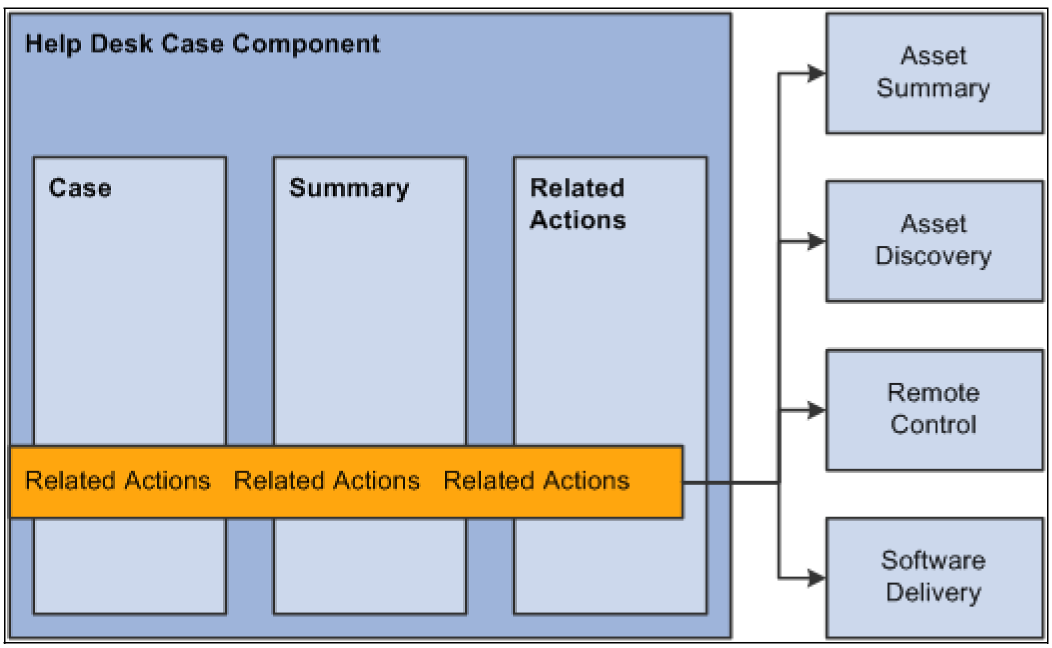
- Access the Asset Administration application.
- Access the Asset Summary process.
- Access the Asset administrator.
- Access the Remote Control action.
- Access the Software Delivery application.

Accessing the Asset Administration Application

Once an agent has opened a case for an employee, he or she can use the Related Actions drop-down list box on either the Case page, the Summary page, or the Related Actions page to access the asset management pages in your third-party asset management system.

Note. PeopleSoft CRM may not integrate with *all* third-party asset management systems, and PeopleSoft cannot guarantee that it will work with your particular third-party applications. PeopleSoft systems support frameworks for which you can open a URL and pass in parameters via the URL. Please ask your consultant for advice on setting up an integration from your third-party asset management system to PeopleSoft CRM.

This graphic illustrates how an agent can access the third-party asset management system from the PeopleSoft HelpDesk application.



Access to Asset Administration from the PeopleSoft HelpDesk component pages

See Also

http://www.altiris.com/

Accessing the Asset Summary

From the Case page in PeopleSoft HelpDesk, agents can run an Asset Summary process to verify configuration details of a specific asset. Using a third-party asset discovery application, this feature also assists help desk agents in performing asset discovery.

The Asset Discovery process gives help desk agents the ability to get the baseline information about the user's asset, which helps agents resolve issues.

To identify an asset on the network:

1. The agent navigates to the help desk case.
2. The agent fills in the required information as well as the asset tag information, saves the case, and then selects *Asset Summary* from the Related Actions drop-down list box or the toolbar.
3. The agent then clicks Go to perform the action.

PeopleSoft CRM passes the serial number information to the third-party application in the URL. If the agent performs the Asset Summary action and the Serial Number field is not populated, the system displays an error message. Once the system performs the Asset Summary action, the system creates a record in the Related Actions grid. The system displays the word *Performed* in the Status field in the Related Action Summary grid on both the Summary page and the Related Actions page in the Case component.

The asset information retrieved is not transferred back to PeopleSoft CRM. Once an agent has access to the third-party application, they can locate the hardware configuration, installed software, specific network information, and the services that are running on the user's desktop.

Accessing the Asset Administrator

From the Case page in PeopleSoft HelpDesk, agents can select *Asset Administrator* from the Related Actions drop-down list box and then click Go to transfer to the third-party asset administration application.

Accessing Remote Control

From the Case page in PeopleSoft HelpDesk, agents can take control of a user's machine to troubleshoot problems by initiating the Remote Control process. Using this feature, help desk agents can effectively resolve an employee issue involving their computer equipment.

Once an agent performs the Remote Control action, the system creates a record in the Related Action Summary grid. The control is then transferred to the asset management application, where an agent can remotely control a user's desktop using the remote control features provided by your third-party vendor.

Generally, remote control software lets the local computer take full operational control of a remote computer, including the ability to launch applications or change system settings.

Accessing Software Delivery

From the Case page in PeopleSoft HelpDesk, agents can select *Software Delivery* from the Related Actions drop-down list box and click Go. This action launches your third-party software delivery application, which is used to install software on various identified assets.

The software delivery application enables agents to efficiently deliver software to desktops, laptops, and servers through intelligent network devices.

Once the agent performs the action, the system creates a record in the Related Action Summary grid on both the Summary page and the Related Actions page in the Case component.

Adding and Reconciling Installed Assets

This section provides an overview of installed assets and discusses adding installed assets for PeopleSoft HelpDesk.

Understanding Installed Assets

The Installed Assets feature enables IT asset information to be shared between the Asset Repository Module (ARM) in PeopleSoft Financials and installed products in PeopleSoft CRM. For a PeopleSoft CRM implementation, ARM is considered the master data source for asset information.

PeopleSoft HelpDesk requires a configuration option at the setID level, which determines whether integration to the ARM is used. This option appears under the navigation Set Up CRM, Product Related, Installed Product, Configuration.

The Integration Options group box and the Enable Asset Integration with PeopleSoft Financials field appear on this page. If you select the check box for this field, the synchronization between the two databases is in effect.

IT asset information from PeopleSoft Financials is published to PeopleSoft CRM as an initial full data synchronization. Subsequent changes made to IT asset data in the ARM triggers an incremental synchronization that is published to update installed product information.

Likewise, any changes made to installed products asset data in PeopleSoft CRM triggers an incremental synchronization that is published to update the PeopleSoft Financials asset information.

The system evaluates data coming from PeopleSoft Financials to PeopleSoft CRM to see if a corresponding installed asset entry already exists, or whether it represents a totally new asset. In the later example, a new entry is created in PeopleSoft CRM. If a possible, but not definite, match exists, the system sends the result to a reconciliation table for analysis by an agent. The agent decides to either update an existing PeopleSoft CRM entry or create a new entry.

Note. The system checks the mapping table first to determine the product ID since a default product ID should always exist in the mapping table (even when no matches exist on the asset subtype, manufacturer, and model data). If no mapping table entry is found, the system derives the product ID from the item ID. The item ID would be used only in cases when no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

See Also

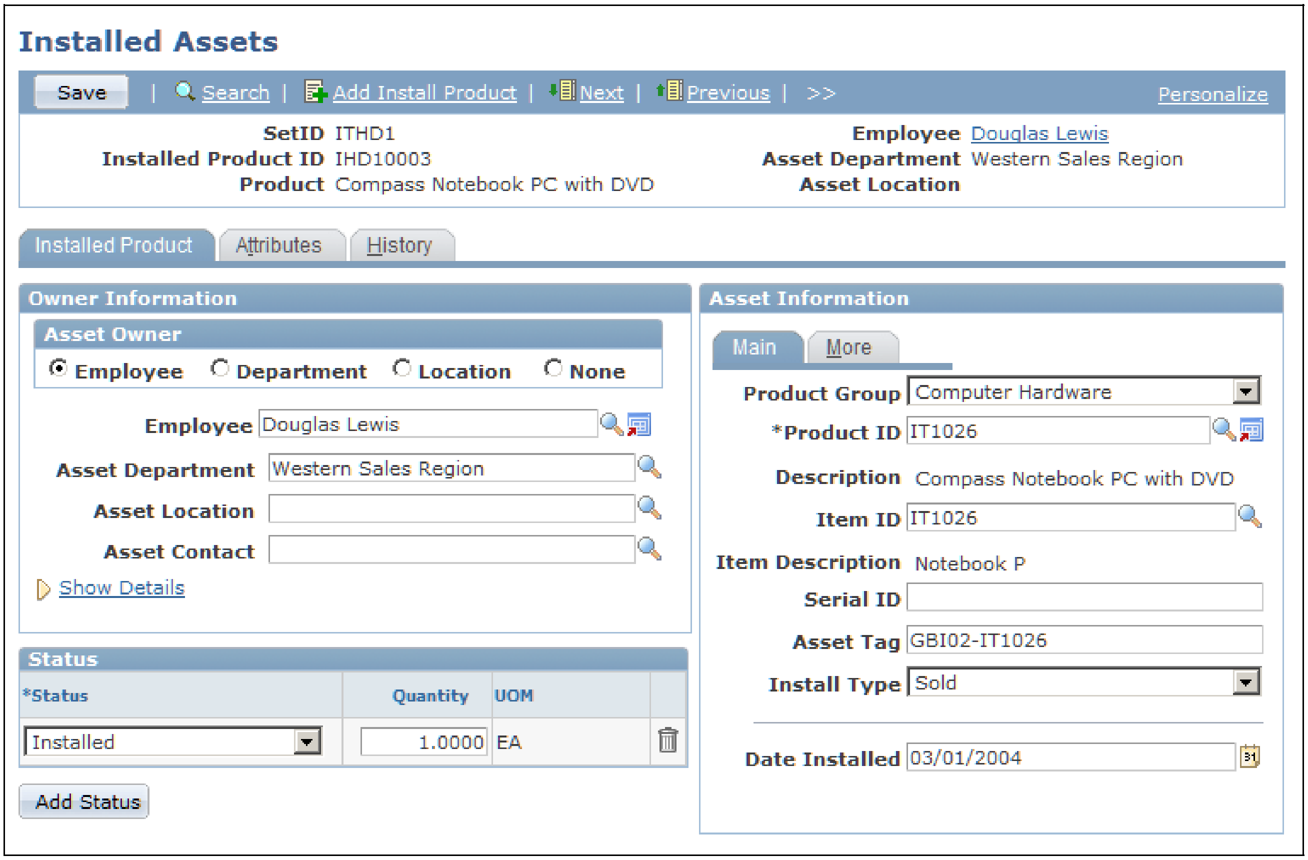
PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products," Understanding Hardware Asset Information Mapping and Reconciliation

Pages Used to Add and Reconcile Installed Assets

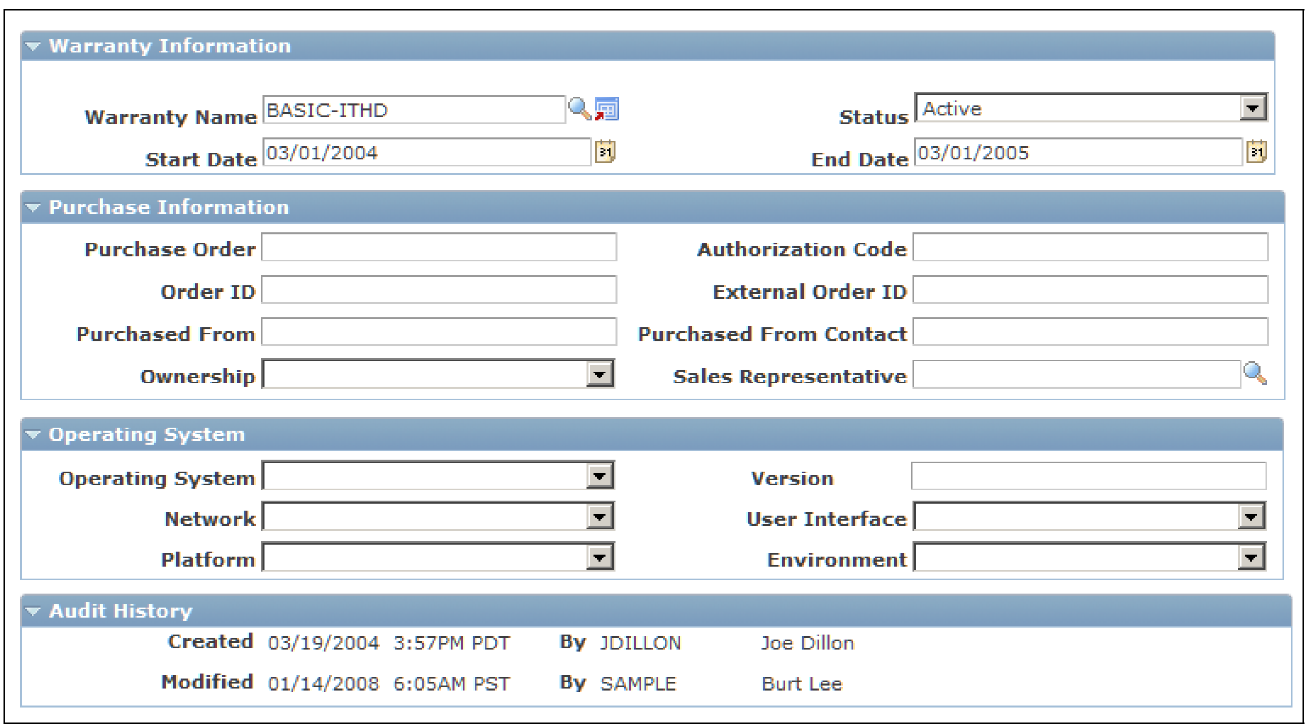
Page Name	***Definition Name***	***Navigation***	***Usage***
Installed Assets	RF_INST_PRODUCT	HelpDesk, Installed Assets, Installed Assets	Create installed assets in the PeopleSoft CRM database.
Asset Reconciliation	RF_ASSET_RECON	HelpDesk, Asset Reconciliation, Asset Reconciliation	Display all possible entries from PeopleSoft CRM that were matched to entries in PeopleSoft Financials. Users can update the data that was entered in PeopleSoft CRM with data that existed in PeopleSoft Financials for the same asset.

Adding Installed Assets

Access the Installed Assets page (HelpDesk, Installed Assets, Installed Assets).



Installed Assets page (1 of 2)



Installed Assets page (2 of 2)

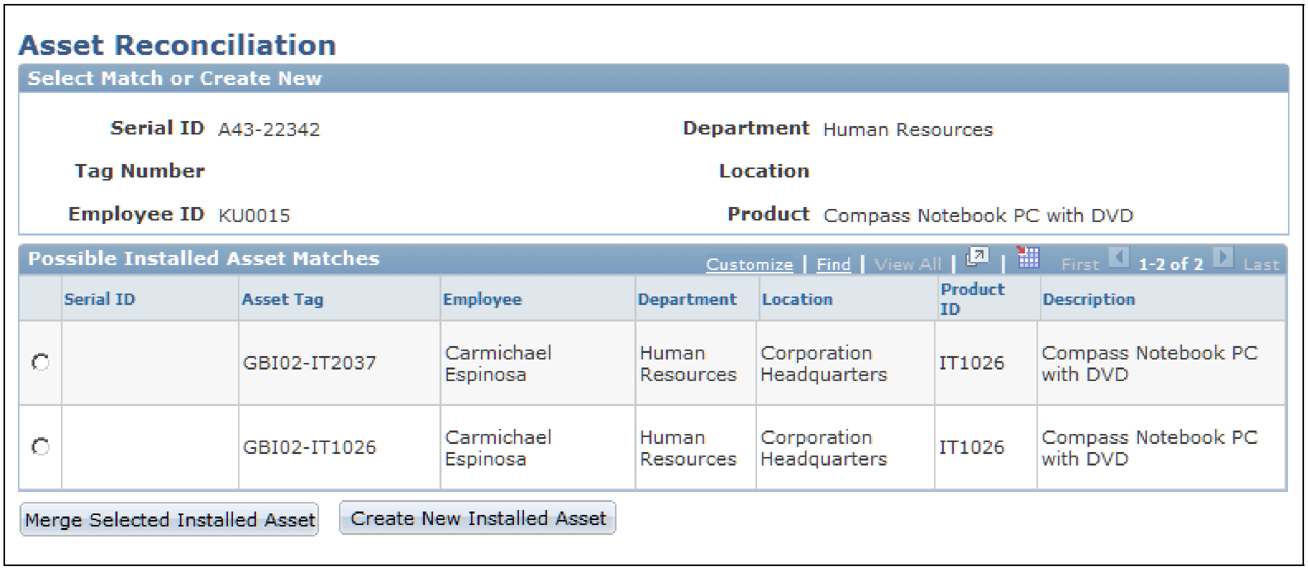
For instructions about using the Installed Assets page, refer to the section below.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products," Managing Installed Products

Reconciling Assets

Access the Asset Reconciliation page (HelpDesk, Asset Reconciliation, Asset Reconciliation).



Asset Reconciliation page

For instructions about using the Asset Reconciliation page, refer to the section below.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products," Mapping and Reconciling Asset Information

Chapter 16

Understanding Asset Lifecycle Management (ALM) for CRM HelpDesk

This chapter provides an overview of PeopleSoft Asset Lifecycle Management (ALM) with PeopleSoft Enterprise CRM.

CRM Asset Lifecycle Management Business Processes

Asset Lifecycle Management (ALM) expands agent and administrator asset management business capabilities through integration with PeopleSoft Financials and third-party asset discovery and control systems.

Using ALM, asset data administrators can:

- Increase control and security of asset data.
- Plan system upgrades more easily.
- More effectively manage the system's total cost of ownership.

Using ALM and your third-party system, help desk agents use case page actions to:

- Run an ad hoc asset discovery process to verify configuration details of a specific installed asset.

  Accessed using the Asset summary action.
- Remotely control an employee's desktop to resolve a problem.

  Accessed using the Remote control action.
- Browse inventory, manage product ads and packaging, and create and manage queries and notifications.

  Accessed using the Asset administrator action.
- Distribute software to the enterprise.

  Accessed using the Software delivery action.

Asset Management Functionality

Asset management provides organizations with the ability to gather information about the hardware and software that is used over their network. The system can also detect the location of personal computers on the network.

Asset management offers these benefits:

- Provides foundation data for effective troubleshooting.
- Facilitates planning for upgrades.
- Helps keep the total cost of ownership under control.
- Helps to accurately determine how much has been invested in a client system.
- Increases company control and security.

Note. PeopleSoft HelpDesk does not currently provide any mechanisms to detect hardware and software assets from within its CRM applications. You must integrate with a third-party application for asset discovery or remote control of technology assets.

See Also

PeopleSoft Enterprise CRM 9.1 Product and Item Management PeopleBook, "Tracking Installed Products"

Integration Architecture and Data Flow

Asset Lifecycle Management is based upon the sharing of information technology (IT) asset information between the Asset Repository Module (ARM) in PeopleSoft Financials and installed products in PeopleSoft CRM. For a PeopleSoft CRM implementation, the ARM is considered the master data source for asset information.

IT asset information from PeopleSoft Financials is published to PeopleSoft CRM as an initial full data synchronization. Subsequent changes made to IT asset data in the ARM triggers an incremental synchronization that is published to update installed product information.

Likewise, any changes made to installed product asset data in PeopleSoft CRM triggers an incremental synchronization that is published to update the PeopleSoft Financials asset information.

The system evaluates data coming from PeopleSoft Financials to PeopleSoft CRM to determine whether a corresponding installed asset entry already exists, or whether it represents a new asset. If there is a definitive match, the CRM installed asset entry is automatically updated with the information from the corresponding Financials entry. If there is a possible, but not definite match, the result is sent to a reconciliation table for analysis by an agent, where he or she makes the decision to either update an existing PeopleSoft CRM entry or create a new entry. If the data represents a new asset, a new entry is created in PeopleSoft CRM.

All Financials entries of Asset_Type 010 (IT-Hardware) are added to the CRM installed asset table when the full sync is performed (COPY_IT_ASSET). Subsequent additions and updates to the Financials asset repository data for Asset_Type 010 entries are thereafter sent to CRM for incremental synchronization.

Understanding Installed Assets

This section discusses system management of new and updated data in the integrated system.

Identifying a Financials Asset in CRM

The CRM Installed Product table requires a Product ID for every Installed Asset. This enables users to see the kind of asset that is being referred to in the system. Since neither Product ID nor Inventory Item ID are required for entries in the Financials Asset table, it is important that CRM installed product table entries are assigned a Product ID.

The CRM system assigns Product IDs according to the Product Mapping table.

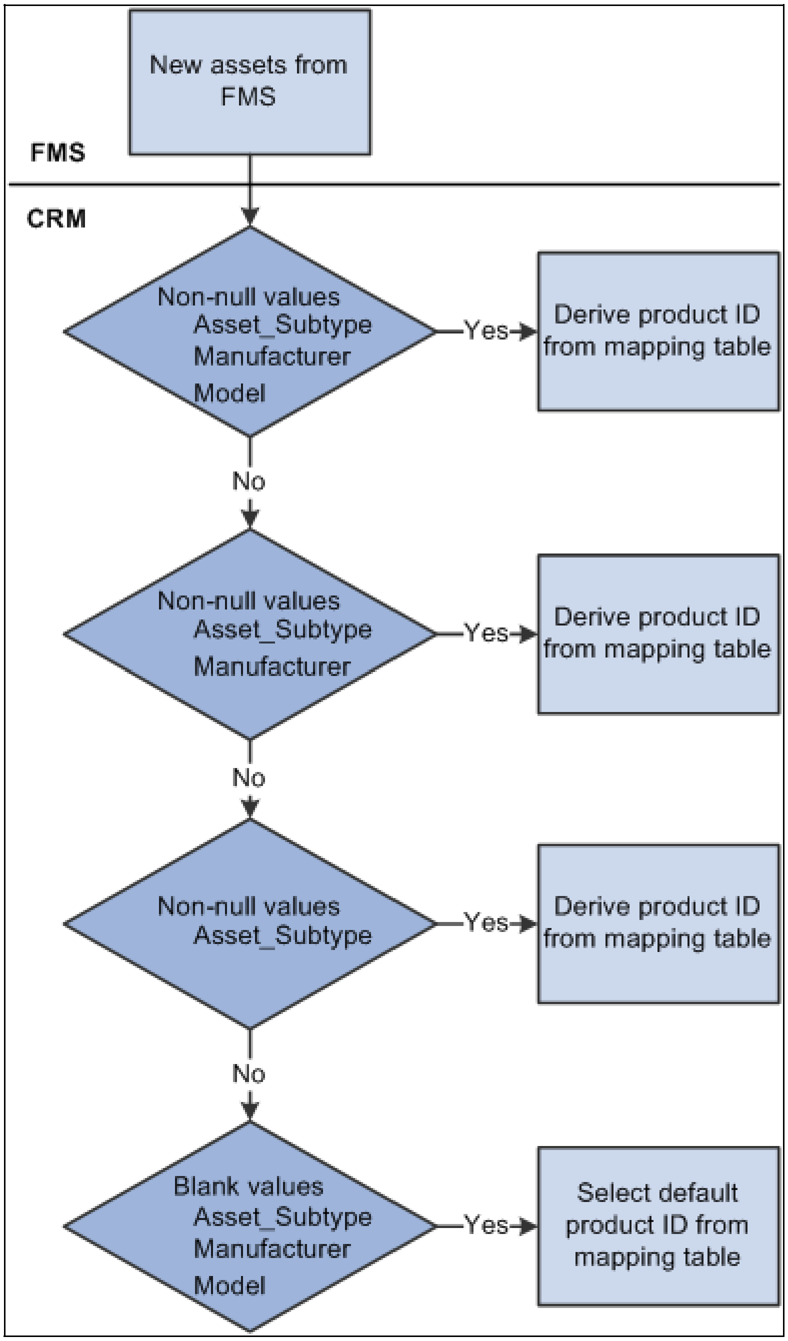
Note. PeopleSoft Financials assets do not store product data, but product ID is a required attribute for CRM installed assets. Therefore, a mapping table specifies the Product ID that CRM should use to create a new entry from Financials asset data. The administrator can add entries to the mapping table to link specific combinations of asset subtype, manufacturer, and model values from Financials with a particular CRM Product ID. Additionally, a default entry is required in the CRM mapping table (designated by just a Product ID value with no subtype, manufacturer, or model values). The CRM system uses the default to create installed asset entries if the mapping table contains no match on more specific combinations of subtype, manufacturer, and model values.

The system checks the mapping table first to determine the product ID since there should always be a default product ID for use in the mapping table (even when there are no matches on the asset subtype, manufacturer and model data). If no mapping table entry is found, the system derives the product ID from the item ID. Thus, the item ID is used only in cases where no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

Assignments by Matching Attribute Values

Ideally, each combination of Financials Asset_Subtype, Manufacturer, and Model corresponds to a CRM product, and each will map to an asset that can conceivably be returned by the Financials system (including the discovery process run on the Financials system). This enables a meaningful CRM product to be associated with each type of Financials asset.

This graphic illustrates how a Product ID is determined for a new asset in the CRM system.



Assigning Product IDs in CRM

When receiving information on a new asset from the Financials system, the CRM system checks the Financials Asset table for a match on non-null values for the Asset_Subtype, Manufacturer, and Model fields. If there is a match, the CRM system uses the corresponding Product from the mapping table to create the new installed asset on the CRM system. If there is no match for the three fields, a match will be attempted on Asset_Subtype and Manufacturer. If a match is found here, the corresponding Product_ID will be used. If no match is found on these two fields, a match will be attempted only on Asset_Subtype. If no match is found on this field, a match will be attempted just on blank values for Asset_Subtype, Manufacturer, and Model (this type of row will correspond to a "default" Product_ID).

Note. A *SaveEdit* error on the mapping page requires a value for Manufacturer if a value for Model is present on that row. In addition, this SaveEdit error requires that the user enter a single "default" value specifying a Product that should be used when no other match applies. This helps ensure that CRM Products can be identified and used for any asset entry that comes from Financials.

As already mentioned, the user ideally would set up data so that the assets sent from Financials (Asset type of IT-Hardware) have values for Asset Subtype, Manufacturer, and Model, and ensure that each of these combinations is mapped to a distinct Product on the mapping page. This would involve setting up the appropriate Asset Subtypes and Profiles on the Financials side, and the appropriate Products and product mapping setup page on the CRM side. Providing a "default" Product ID as described above ensures that a Product ID can always be found for use in the CRM Installed product table. This is required since the CRM Installed Product table requires a Product ID value for each of its entries.

Important! Before adding data to the Product Mapping page, the user must run the *Manufacturer_Fullsync* and *Copy_AM_Subtype* full synchronizations. Synchronizations are discussed further in Chapter 2, Setting Up Integration and Data Transfer, "Setting Up the Mapping Table."

Updating CRM Asset Data With New Asset Information from Financials

When asset data is sent from Financials to CRM, the CRM installed asset table is updated with the corresponding asset data. The identification logic involves filtering data attributes to find matches between Financials and CRM. The logic must account for definite positive matches, assumed positive matches, and ambiguous match results.

Positive Matches

This table depicts the conditions that result in the three possible update outcomes when the CRM system identifies a match of one or more of the four asset table values in the Financials asset data:

Required Match Conditions				***CRM Update Outcomes***
Serial ID	***Business Unit***	***Asset ID***	***Installed Product ID***	
	Match*	Match*		The CRM data for that row is updated with all the values from Financials. This may occur when data for an asset has previously been received from Financials by CRM and a change is subsequently saved and published by Financials.
			Match	The CRM data for that row is updated with all the values from Financials. This may occur when data for an asset was created by CRM and sent over to Financials and a change is subsequently saved and published by Financials. The corresponding CRM entry would have the same Installed Product ID but would not yet have values for Business Unit and Asset ID.

Required Match Conditions				*CRM Update Outcomes*
Serial ID	*Business Unit*	*Asset ID*	*Installed Product ID*	
yes	No match*	No match*		The CRM data for that row is updated with all the values from Financials. This may occur if data for the same asset has been entered independently in both Financials and CRM prior to initial synchronization. If data for the same asset has been entered in Financials and CRM in a prior release, the Financials entry will initially not have the key fields for the corresponding CRM entry and the CRM entry will initially not have the key fields for the corresponding Financials entry. However, if both entries refer to the same Serial ID, it can be assumed that they refer to the same actual asset.

* Both conditions must be true.

Assumed Positive Matches

Match conditions vary depending on the asset:

- Asset Tag

  If there is a match between Financials and CRM based on identical non-null values for asset tag and product, and if there is a blank value for Business Unit, Asset ID, and Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies in situations where data for the same assets already existing in Financials and CRM (but in which CRM may only have a value for Asset_Tag, rather than Serial ID), and an update from Financials needs to be matched against the corresponding CRM entry.

- Employee and Product

  If there is a single matching row between Financials and CRM based on identical non-null values for employee ID and product ID, and there is a blank value for Business Unit, Asset ID and Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies in situations where data for the same actual assets already exists in Financials and CRM, and an update from Financials needs to be matched against the corresponding CRM entry. If there is single entry in CRM that matches the assigned employee and Product, it is assumed to refer to the same actual asset, and the CRM entry will be updated.

- Department and Product

  If there is a single matching row between Financials and CRM based on identical non-null values for Department ID and Product ID and there is a blank value for SeriaI ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies to situations where data for the same actual assets already exists in Financials and CRM (but in which CRM may only have a value for Asset_Tag, rather than Serial ID), and an update from Financials needs to be matched against the corresponding CRM entry. If there is a single entry in CRM that matches the assigned department and Product, it is assumed to refer to the same actual asset, and the CRM entry will be updated.

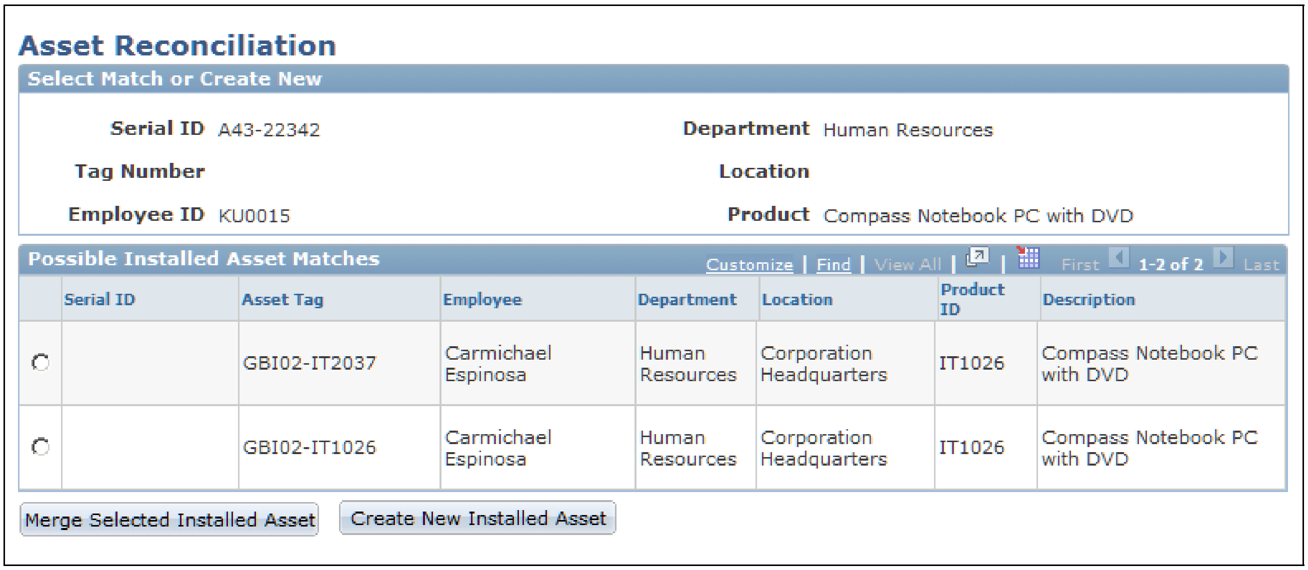
Ambiguous Matches

When it is not possible to unequivocally determine that the asset is definitely the same or definitely different on both systems, the data for that row is sent to a reconciliation table that the administrator can access in the CRM application. The reconciliation table lists the assets, with their attribute data, that require reconciliation with CRM entries. The administrator can open each entry to view the possible matches with existing CRM installed assets based on the matches on Product_ID and one or more of the following: Emplid, Deptid, or Location.

The administrator can:

- Confirm that the CRM entry refers to the same asset represented by the data from Financials and update the CRM data with all the values from the Financials system.
- Specify that the Financials data does not refer to any asset on the CRM side and create a new CRM installed asset.

The asset manager reconciles ambiguous matches on the Asset Reconciliation page, shown in this figure.



Asset Reconciliation example

In this example, a Financials entry for a Compass Notebook computer with Serial ID A43-22342 belonging to Carmichael Espinosa (Emplid KU0015) was received. However, the search results show two existing CRM installed assets for the same person and product. Since the CRM entries have no Serial_ID value, it is not possible to automatically determine if either asset is the same actual asset as the Financials entry; the match results are ambiguous.

The asset manager must now conduct research on the two CRM entries to determine whether either of them does indeed represent the same asset as the new entry from Financials (serial id A43-22342). If research indicates that the actual asset represented by the first CRM entry (Asset Tag GBI02–IT2037) has a serial ID of A43-22342, then it is in reality the same asset as the entry from Financials. To reconcile the data, the manager selects the first CRM asset in the table and clicks the Merge Selected Installed Asset button, thus merging the data from the new Financials entry with that CRM installed asset entry.

On the other hand, if neither serial ID of the two CRM entries corresponds to the Financials entry, then the entry represents a different physical asset. The manager reconciles the new data by clicking the Create New Installed Asset button to create a new CRM Installed Asset entry from the data of the Financials entry, giving Carmichael Espinosa a total of three Compass Notebook installed asset entries.

With ambiguous matches, often data for the same actual assets exists in Financials and CRM (but in which CRM may only have a value for Asset_Tag, rather than Serial_ID) because the lack of matching unique identifiers and/or the presence of multiple potential matches prevents a positive match.

Note. The status value of a Financials asset does not map directly to the status of the corresponding CRM installed asset. The Financials system will only update the CRM Installed asset entry to "Installed" or "Uninstalled", depending on what transaction is being executed in Financials.

For example, whenever a user updates an asset in the Basic Add page in Financials, the status of the new or existing CRM installed asset is updated to "Installed" (stored in the system as "INS") regardless of the actual status value of the asset in Financials. Whenever a user disposes of an asset in the Financials system, the status of the corresponding CRM installed asset is set to "uninstalled" (stored in the system as "UNI").

Chapter 17

Creating Work Orders from Cases

This chapter provides an overview of PeopleSoft CRM work order requests and discusses how to:

- Create work orders.
- View work orders.
- Reply to work order information requests.

Note. This chapter pertains to PeopleSoft HelpDesk only; PeopleSoft Support and PeopleSoft HelpDesk for Human Resources do not incorporate work order functionality.

See Also

PeopleSoft Enterprise Maintenance Management PeopleBook, "Setting Up Maintenance Management Integrated Products and System Parameters," CRM Setup Considerations

PeopleSoft Enterprise Maintenance Management PeopleBook, "Setting Up Statuses for Service Requests and Work Orders," Defining Work Order Statuses

PeopleSoft Enterprise Maintenance Management PeopleBook, "Defining Work Order Templates"

PeopleSoft Enterprise Maintenance Management PeopleBook, "Creating a Work Order"

Understanding Work Order Requests

This section discusses:

- Work order functionality.
- Integration points with PeopleSoft Financials.
- Work order descriptions and status changes.
- Relationships between work orders and cases.
- Work orders and the 360-degree view.
- Installed product history.

Work Order Functionality

If an agent is working on a help desk case that he or she cannot resolve, the agent can create a work order from the case to assign a technician to troubleshoot and solve the problem.

The agent creates a work order when the solution search results recommend the creation of a work order or the agent determines that he cannot resolve the case in a reasonable amount of time.

To create a work order from a case, an agent must select *Worker Order - New* from the Actions field on either the Case page, the Case - Summary page, or the Case - Related Actions page, and then click the Go button. This action takes the user to the Create Work Order page. When the agent provides the required information on the Create Work Order page and clicks the Create Work Order button, the Add Work Order Transaction message is triggered.

Once an agent creates a work order, a help desk agent can:

- Access the work order in PeopleSoft Maintenance Management from the Related Actions section on the Case - Summary page or the Case - Related Actions page.
- Receive workflow events in his or her worklist when there is a status change or description change on the work order.

  If an Active Analytics Framework (AAF) status change or description change policy is activated, both email and worklist notifications are sent.
- Relate existing work orders to cases.

Integration points with PeopleSoft Financials

The integration between IT HelpDesk in PeopleSoft CRM and Maintenance Management in PeopleSoft Financials is accomplished with application messaging using the PeopleTools Integration Broker.

The following messages are used for this integration:

Main Messages

These are the main messages that the system uses to transfer information:

- Add/Update Work Order Transaction (SYNC_WORK_ORDER_REQ)
- Add/Update Transaction Acknowledgement (SYNC_WORK_ORDER_RSP)
- Key Event Change Notification (SYNC_WM_WO_KEY_EVENT)

Setup Messages

These are the setup messages that the system uses to transfer information:

- Problem Code Tree (COPY_PROBLEM_TREE)
- Problem Location (COPY_SHOP_LOC)
- Work Order Status COPY_WO_STATUS)

- Work Order Priority (COPY_WM_PRIORITY)

Work Order Descriptions and Status Changes

When the work order description or status on the Work Order page changes, the system sends the Key Event Change Notification message to PeopleSoft HelpDesk.

To trigger changes to a case when its associated work order's status or description changes requires that you use AAF to create a case change policy triggered by work order status and description changes.

Use these terms to build a new policy within the Case Update Action Type:

- Work Order ID
- Work Order Summary
- Work Order Description (Task Notes)
- Work Order Status

For example, a policy can specify that when the work order status changes from *Open* to *Closed,* the system updates the case status to *Closed* and notifies the requester or sends the customer a satisfaction survey.

The Key Event Message is not, however, enabled by activating AAF policies. You must also subscribe to the Key Event message. When a user changes the status or description on a work order, the system triggers the AAF description and status changes and then publishes the Key Event message.

To create policies for work order changes:

1. Navigate to Enterprise Components, Active Analytics Framework, Policies, Manage Policies.
2. Access either the Work Order Status Change or Work Order Description Change policy.
3. Click the Activate button.

These policies represent a message display process that runs when the event type in the Key Event Change Notification message is set to a work order status change or a work order description change.

Once the message is activated, the agent can click the URL in the worklist or email notification to launch the Case Summary page for the case that is associated with the work order.

See *PeopleSoft Enterprise Components for CRM 9.1 PeopleBook: Building and Managing Policies.*

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Working with Active Analytics Framework," Understanding CRM Action Types.

Relationships Between Work Orders and Cases

Cases can be related to one another to create cross-referencing in a help desk knowledge base. For the same reason, correlating similar work orders is often advantageous. However, the system does not allow a work order to be related to another work order. Instead, work orders are related to each other through a case. For example, when two cases pertain to the same problem and one case has a related work order, instead of creating another work order on the second case, relate the second case to the first case by searching on the work order ID or the description.

An agent can create as many work orders per case as necessary. Conversely, an agent can create multiple cases for the same problem and work order. In this situation, the work orders can be related to each other through a *global* case that represents the other cases with the common work order. The work order the agent can relate the cases to is then associated with the common work order.

All workflow is then driven off the global case. For example, when the status of the common work order changes, email notifications are sent to agents assigned to the related cases.

When an agent creates a help desk case for an employee and determines that a work order is needed, the agent can also determine if the issue is global (for example, a network or common area printer is down). The agent can check for the existence of a global case with a related work order. AAF policies, however, do not send workflow to all related cases.

Work Orders and the 360-Degree View

If a work order is associated with a case, agents can view the work orders on the Worker 360-Degree View page. Work orders appear as a node on a tree. For each work order status, the system displays a link and the number of work orders at that status.

When an agent clicks one of the links, the system displays all work orders with that status in a dynamic grid in the right-hand column of the page. This display includes all work orders with a specific status that are associated to cases that have been reported by the employee.

The dynamic grid contains 4 columns:

- Work Order ID
- Work Order Description
- Work Order Status
- Case ID

Help desk agents can access the work order in PeopleSoft Financials by clicking the work order ID from the 360-Degree View page in PeopleSoft CRM. The agent does not have to log in to PeopleSoft Financials to access the work order because the system uses single signon technology for access to both databases. The work order tree node only appears on the Worker 360-Degree View page.

Installed Product History

After an agent creates a work order, the Work Order ID field appears in the Associated Cases grid on the Installed Product History page. If a case has more than one work order associated with it, the case ID is repeated on additional rows; however, the work order ID is unique. The system turns the work order ID into a link, which enables the agent to access the work order in PeopleSoft Financials through a single sign on.

Creating Work Orders

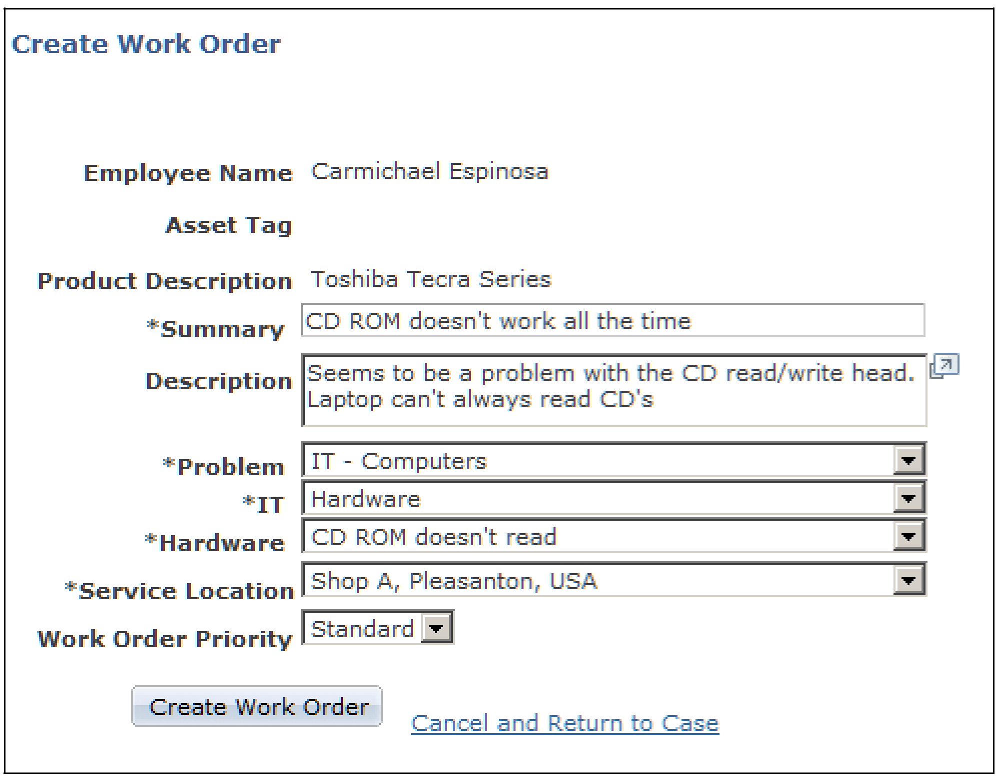
This section discusses how to create work orders in PeopleSoft CRM.

Page Used to Create Work Orders

Page Name	***Definition Name***	***Navigation***	***Usage***
Create Work Order	RC_LINK_WO_SEC	HelpDesk, Add Case, Case Select *Work Order - New* from the Related Actions drop-down list box and then click Go. HelpDesk, Search Cases, Case Select *Work Order - New* from the Related Actions drop-down list box and then click Go.	Create a work order in PeopleSoft Financials. **Note.** You can also create a new work order from the Case - Summary page and the Case - Related Actions page using the same method described previously.

Creating Work Orders

Access the Create Work Order page (HelpDesk, Add Case, Case, select *Work Order - New* from the Related Actions drop-down list box and then click Go).



Create Work Order page

The system takes information from the Case page and displays it on the Create Work Order page for these fields: Employee Name, Asset Tag, Product Description, Summary, and Description.

Note. If necessary, an agent can change or add additional text to the Summary and Description fields.

Problem

Select the problem that best describes the caller's issue.

The system may or may not display additional problem fields based on the parent-child relationships that exist between the problem codes.

The problem code fields guide an agent's choices for identifying or classifying the problem. Each level in the problem selection provides a more detailed explanation as to the type of problem being reported against the installed asset. Based on the selection, the system may display additional fields, such as Computer,ITAM (Information Technology Asset Management) and Hardware.

The problem code you select also drives the available values for shop location, as would be the case if shops are categorized by the problem they service. This data comes from the Financials Work Management application.

The problem code that you select here drives the values that the system uses to create the work order in PeopleSoft Maintenance Management.

Service Location

Select the location where the item will be serviced. The system pulls information in the service location drop-down list box from the Work Management Shop Location table (PS_WM_SHOP_LOC2_VW).

The service location is the location where the installed asset is sent for repair. This location can also be the where the technician is located.

Work Order Priority

Select a value that matches the priority that you think should be given to the problem you are having.

This field is used as an override. If it is not populated, the system populates the Priority field from the work order problem code.

Viewing Work Orders

This section discusses how to view work orders in PeopleSoft CRM.

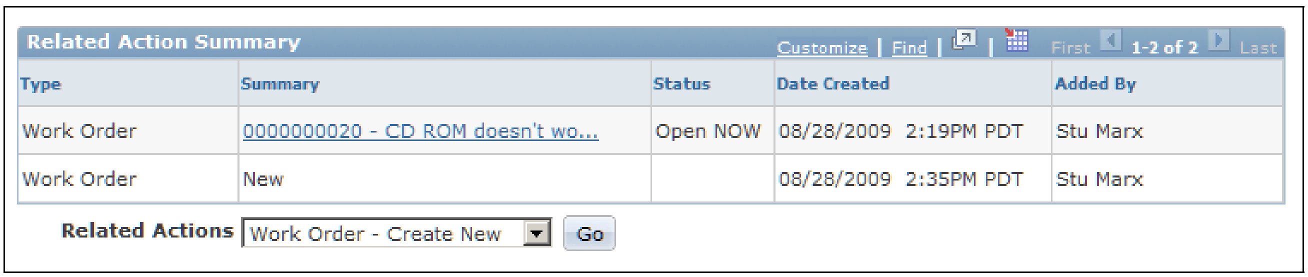
Pages Used to View Work Orders

Page Name	*Definition Name*	*Navigation*	*Usage*
Case - Summary	RC_CASE_SUMMARY	HelpDesk, Search Cases, Summary	View work orders.
Case - Related Actions	RC_ASSOCIATION	HelpDesk, Search Cases, Related Actions	View work orders.

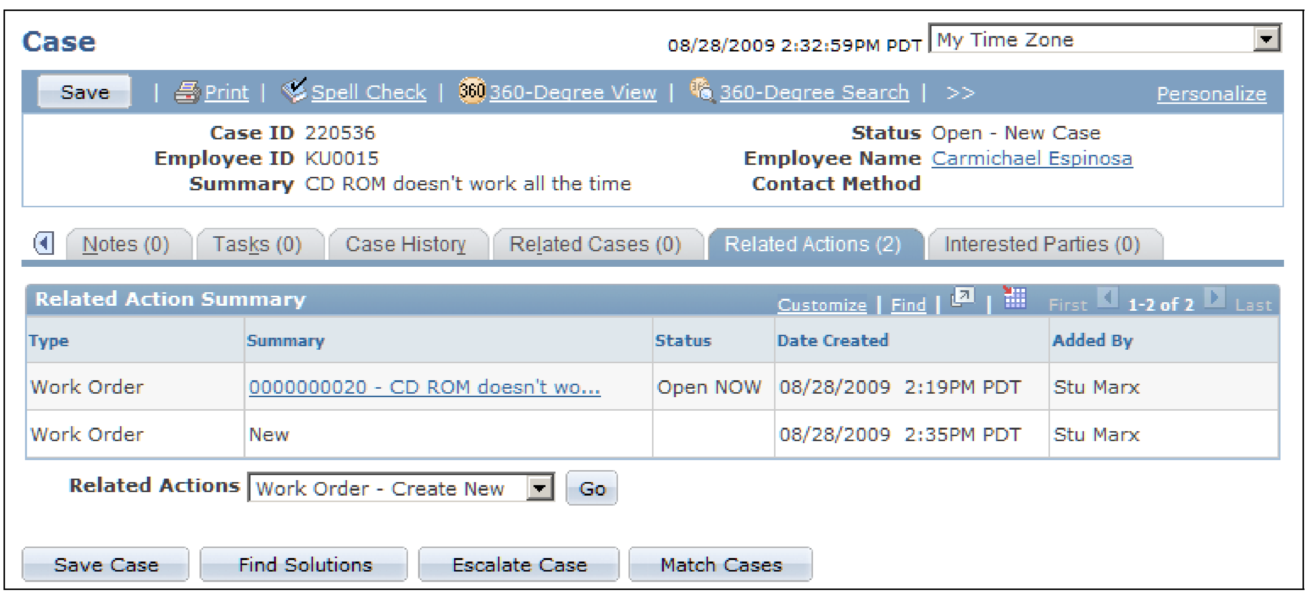
Page Name	***Definition Name***	***Navigation***	***Usage***
Installed Assets - History	RF_INST_PROD_HIST	• HelpDesk, Installed Assets, History, Cases • HelpDesk, Search Cases, Case Click the Transfer to Installed Assets button next to the Asset Tag field.	View work orders that are related to cases.

Viewing Work Orders

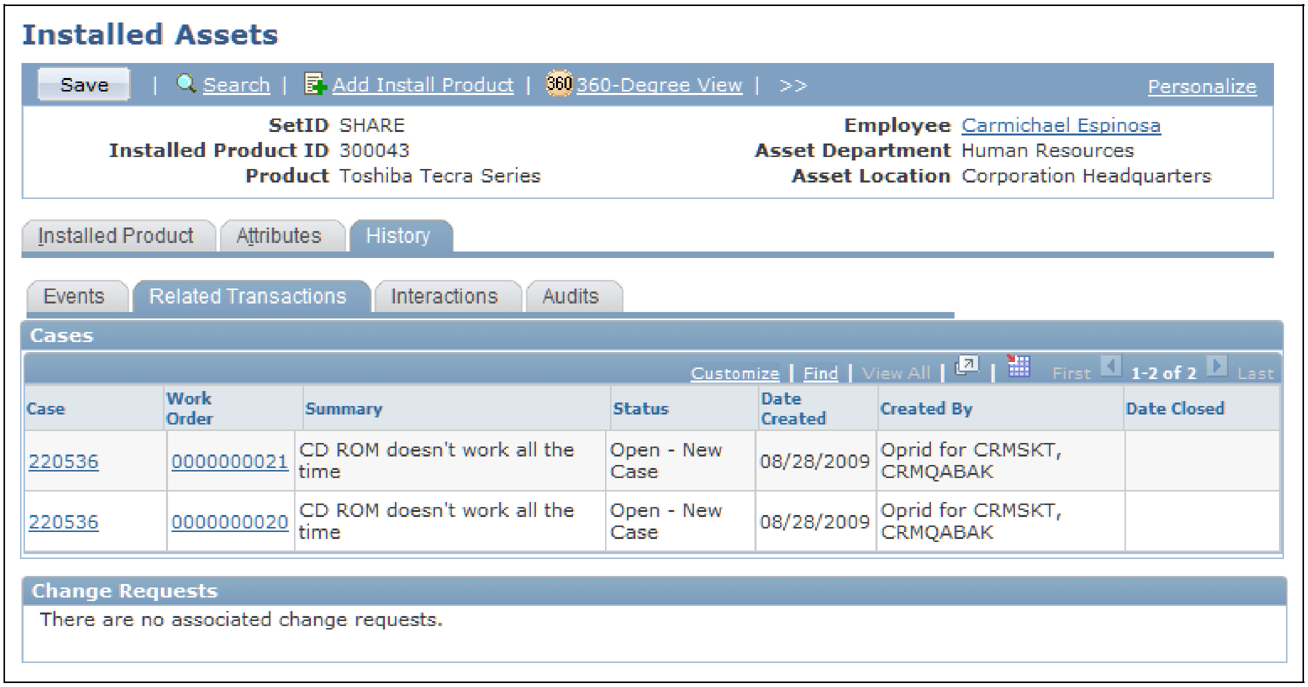
Access the Case - Summary, Case - Related Actions, or Installed Assets - History page (HelpDesk, Search Cases, Summary or HelpDesk, Search Cases, Related Actions or HelpDesk, Installed Assets, History, Cases).



Case - Summary page: Related Action Summary section



Case - Related Actions page



Installed Assets: History page - Related Transactions

Before PeopleSoft CRM receives the Add/Update Transaction Acknowledgement message from PeopleSoft Financials, the system populates these fields in the Related Action Summary grid:

- Type

  The system populates this field with the words *Work Order*.

- Summary

  The system populates this field with the word *New*, indicating that the work order is in the process of being created.

- Status

  The system does not populate this field until the work order is actually created in PeopleSoft Maintenance Management.

- Date Created

  Date the agent initiated the creation of the work order (not the date the work order was actually created in PeopleSoft Maintenance Management).

- Added By

  The system populates this field with the login name of the agent who created the work order.

Note. If another help desk case is related to an existing work order, the Added By field displays the name of the agent who created the work order, not the name of the person who linked the existing work order to the case.

Once PeopleSoft CRM receives the Add/Update Transaction Acknowledgement message, the system updates the Related Action Summary grid for the work order row. Updating consists of displaying the work order ID and description in the Summary field and turning the text into a link that agents can use to view the work order in PeopleSoft Maintenance Management. Additionally, the system resets the Status field to the Work Order header status and sets the Date Created field to the date and time that the work order was created in PeopleSoft Maintenance Management.

When a work order cannot be created in PeopleSoft Financials, it sends an error message to the CRM database. To view the message, click the Error Details link on the Case - Related Action Summary page.

Replying to Work Order Information Requests

This section provides an overview of information requests and discusses how to reply to information requests for work orders in PeopleSoft CRM.

Understanding Information Requests

To request information on the work order for a specific task, a technician must create a task note in PeopleSoft Maintenance Management by selecting the Needs Reply check box and then entering text in the Note field requesting additional information.

When the technician clicks the Send To Requester button, PeopleSoft Maintenance Management sends a request for information by email to the agent handling the case and sets an indicator on the Work Order, Tasks Notes, and Notes pages in PeopleSoft Maintenance Management to capture the request for more information. This indicator is also used to capture request-for-information replies from PeopleSoft CRM. The contents of the email notification are determined by PeopleSoft Maintenance Management.

To respond to the request, the agent using the CRM application clicks the URL in the email. The URL has the work order ID embedded in it. When an agent clicks the link, the system displays the Reply To Work Order Information Request page in PeopleSoft Maintenance Management. The agent completes the reply and saves it.

After the agent saves the Reply to Work Order Information Request, PeopleSoft Maintenance Management creates a new work order task note to capture the reply, updates the reply indicator on all pages, and sends an email notification to the technician indicating that a reply has been received.

PeopleSoft HelpDesk ignores the Key Event Change Notification message when it contains a request for more information and a reply to a request for more information, as the work order task notes are not stored on the Case Notes page in PeopleSoft CRM.

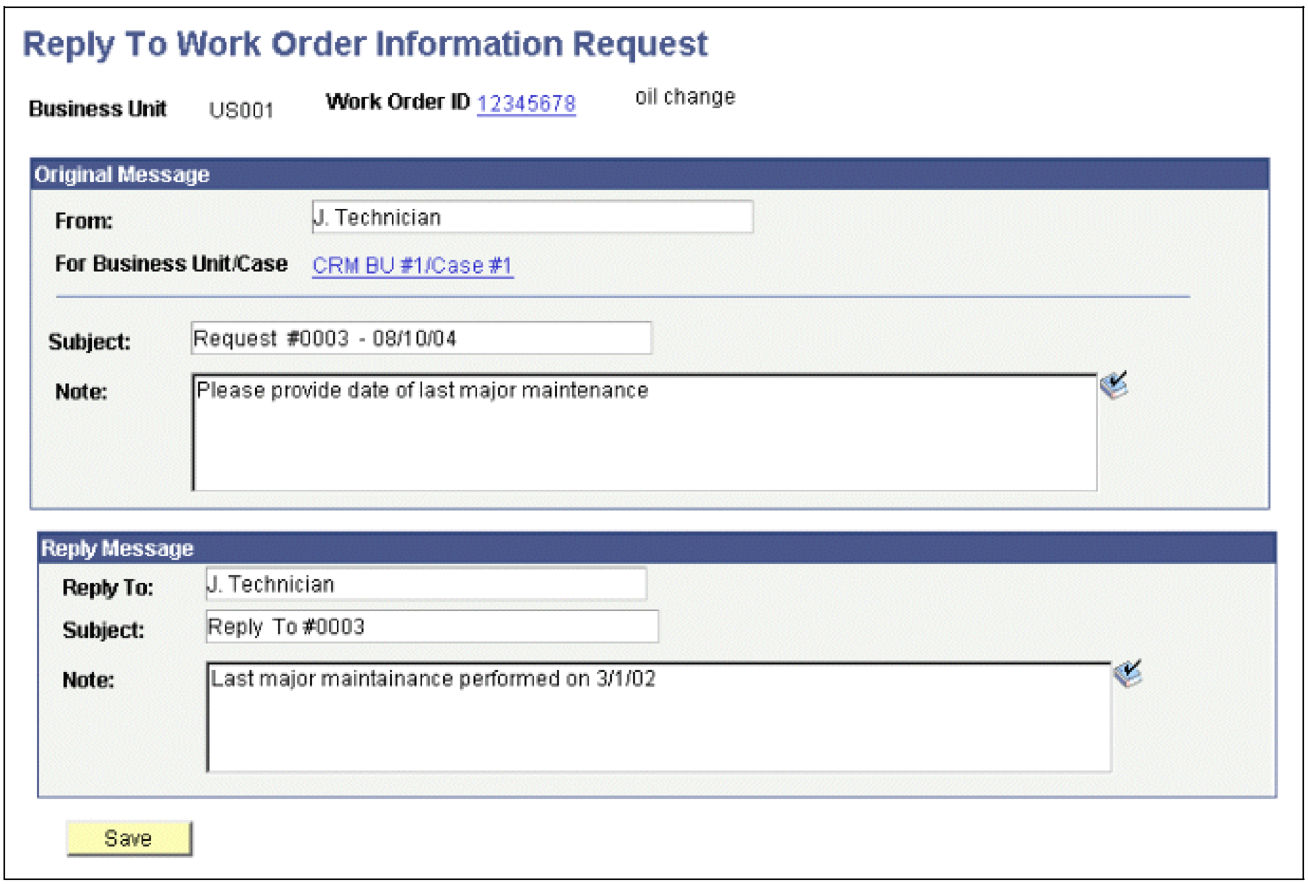
For information purposes only, the Key Event Change Notification message sends the note, case ID, and work order ID to PeopleSoft HelpDesk. In the event that the case is reassigned to another agent, the Add Work Order Transaction message sends contact information to PeopleSoft Maintenance Management. Therefore, PeopleSoft Maintenance Management should always have the most current assigned-to person for a given case. To complete the process, the technician reviews the note and selects the Reviewed check box. PeopleSoft Maintenance Management updates the reply indicator on the Work Order, Tasks Notes, and Notes pages.

Page Used to Reply to Work Order Information Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Reply To Work Order Information Request	WM_WO_NOTE_REPLY	Click the URL in the request for information email that is sent from PeopleSoft Maintenance Management.	Provide more information to the technician who is working on a fix or servicing your customer's problem.

Replying to Work Order Information Requests

Access the Reply To Work Order Information Request page (click the URL in the request for information email that is sent from PeopleSoft Maintenance Management).



Reply To Work Order Information Request page

Enter the information that the technician requested in the Note field in the Reply Message section of the page. Click Save when you are finished. The system creates a new work order task note to capture the reply, updates the reply indicator on all pages, sends an email notification to the technician indicating that a reply has been received, and sends a Key Event Change Notification message with the response text to PeopleSoft HelpDesk.

Chapter 18

Using Change Management

This chapter provides overviews of accessing and managing change requests and discusses how to:

- Access change requests.
- Manage basic change request information.
- Manage tasks.
- Manage notes.
- Manage related changes.
- Manage related actions.
- Manage interested parties.
- Review change request history.

See Also

Chapter 6, "Setting Up PeopleSoft Change Management," page 147

Understanding Change Request Access

This section discusses the five ways to access change requests:

- Through the HelpDesk menu.

  Navigate to HelpDesk, Add Change Request or HelpDesk, Search Change Requests.

  Note. If you want to create a new change request, the system displays a blank Change Request page. If you want to search for existing change requests, the system displays the configured search page for Change Management.

- From the HelpDesk Case page.

  From the HelpDesk Case page, the Actions section enables the user to directly create a new change request. Creating the request for change from the case creates a direct link between the change request and the case. You can view the change request from the case and the case from the change request.

- From the Quality Management - Defect page.

  Using the Related Actions functionality, you can create a new change request directly from the defect. Also, you can identify and link an existing change request to the defect. Linking causes the change request to be viewed from the defect, and the defect to be viewed from the change request.

- From the Worker 360-Degree View page.

  This page provides the ability to both add a new change request from the employee view, and to view any requests already added by that employee.

- From Employee Self Service.

  You can add a change request by navigating to Employee Self Service, HelpDesk, Add Change Request.

Understanding Change Request Management

This section discusses:

- Main Change Request page.
- Notes page.
- Tasks page.
- History page.
- Related Changes page.
- Related Actions page.
- Interested Parties page.

Main Change Request Page

You can access the main Change Request page by using any of the five available methods. After the page appears, you can see the six distinct sections on the Change Request page:

- Requestor Information section.

  The user must enter a change request requester. The agent can select a person from any available employee record. The system provides the default values for the requester's department, location, manager's name, and manager's telephone fields from the employee record that was selected.

- Change Request section.

  In this section, you record information about the nature of the change request. The Summary, Business Unit, Request Type, Status, and Priority fields are required to save the change request. The other fields are informational only. You configure values for these fields. You set up these values by navigating to Set Up CRM, Product Related, Change Management.

  See Chapter 6, "Setting Up PeopleSoft Change Management," page 147.

- Product Information section.

  This section enables you to link a particular product to a change request.

  Users can link affected product groups or installed products to the change request using the Lookup button. They can refine the affected product further by linking the specific asset tag of the item affected. The View Affected Parties link appears when the selected installed product has specific employees linked to it. Clicking this button results in the appearance of all of the linked employees.

- Change Control section.

  This section is used to record more specific information about the change request. The Impact, Category, Release #, Resolution, and Requested By Date fields are informational only.

  The start dates and start and end times are not only informational; the system uses these fields to calculate duration. The 24/7 check box enables work to be scheduled beyond a normal Monday to Friday, 9 to 5 work week.

  The system uses the values entered in the Schedule subsection as a guide for the phase and for the task start and end dates. All phase and task dates, whether built manually in the Phase Summary section on the main Change Request page or populated automatically from the Phase Model setup option, are not allowed to start before the start date indicated in the Schedule subsection in the Change Control section. The system provides the value in the End Date field by default. It is the last date on the last task when the phase model or task model was either built or automatically loaded.

- Phase Summary section.

  Use this section to manage the phases and tasks that are associated to a change request. Only phases are displayed in this grid. You can view associated tasks and phases on the Tasks page. Each phase in the Phase Summary section consists of a task or set of tasks that need to be completed in order for a change to be successful. Any required approvals should be presented in the form of an approval task.

  See Chapter 18, "Using Change Management," Tasks Page, page 428.

  You can build phases manually in this grid. Alternatively, you can have the system automatically populate phases and tasks by selecting a template and clicking the Load button.

  See Chapter 6, "Setting Up PeopleSoft Change Management," Setting Up Phase Templates, page 168.

  You can load any template by choosing the appropriate template name and clicking the Load button.

  If users click the Load button without first selecting a phase template, all phase templates whose type, subtype, or priority fields match the type, subtype, and priority fields of the change request appear. Users then select the desired phase template, thus populating the phases in the Phase Summary grid and tasks on the Task page. You can manually build phases by clicking the Add Phase button.

- Audit History section.

  This section tracks the dates and times that the change request was created and modified.

Note. The Change Control, Phase Summary, and Audit History sections are collapsed by default when you access the Change Request page.

See Chapter 18, "Using Change Management," Accessing Change Requests, page 430.

Notes Page

Notes pages follow the standard Notes and Attachments format that is used throughout the PeopleSoft Enterprise CRM application suite. During the course of a change cycle, specific types of documentation may be required, such as backout plans, design documents, or a cost benefit analysis.

To identify these common documents within a specific note, PeopleSoft Change Management provides a Note Type field. Before adding an attachment to the note, you can identify the note type from the drop-down list box. The user configures the values in this field.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

Tasks Page

The Tasks page displays all tasks, process flow steps, and decision points that are associated with a Change Request. PeopleSoft Change Management carries the task ID link to point to the Task Management application for the actual definition of the task.

Task Management tracks each task associated with a change request. Change Management uses Task Management functions for task groups to further define and control the process flow of a change request.

Tasks can be added, deleted, and edited from this page. They can be added automatically using the phase model or added manually.

Note. When an owner is added or changed on a change request, and at least one task is in the status of *In Progress,* the system displays a message asking if the change request owner should be applied to any uncompleted tasks. If the user clicks *No,* the system does not apply the owner on the change request to any tasks when the change request is saved. If the user clicks *Yes,* the system applies the owner on the change request to all uncompleted tasks that are not canceled when the change request is saved. If there are no tasks with the status of *In Progress,* then the system applies the owner change to all tasks on the change request, and the user does not receive a message. The system automatically makes the change.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Using Business Projects," Managing Tasks

History Page

AAF events control the process flow of a change request. Whenever an event is processed on a change request, it is audited and then appears on the History Events page.

Whenever a change is processed on a change request, it is audited and then appears on the History Audit page. The records to be audited are configurable when you set up your PeopleSoft CRM applications. History interactions appear when email is used to notify an assigned worker of a task action or status change.

Related Changes Page

The Related Changes page provides the ability to link similar change requests in either a parent/child or an equal relationship.

A status change is referred to as *cascading* when a status change on one change request causes the same status change on one or more change requests automatically. Cascading changes occur when a user manually changes the status or when an AAF rule executes unattended.

Several conditions must exist for cascading status changes to occur. First, the change request whose status is being changed must be related to another change request. Two characteristics define each relationship:

- Type
- Hierarchical indication

When the type is *Global* and the hierarchy indicator is a parent of the change request whose status is changing, then a cascading status occurs. If the status change is to a final type status (such as *Closed, Completed,* or *Rejected*) then the system displays a related change request with the two characteristics. These changes apply to online manual status changes.

For AAF rule execution status changes, the status is cascaded automatically when the Changed To status is marked as a cascading type status (see Status setup for this indicator).

Note. PeopleSoft Change Management does not deliver a definition or AAF rule for rule execution status changes. You can, however create your own rules using the PeopleSoft AAF functionality.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

Related Actions Page

PeopleSoft Change Management also provides the ability to link cases and defects to a change. If a change request was initiated by defect identification or from a help desk case, you can link those defects and cases directly to the change request.

Linking a defect or case to a change request enables the user to drill down into these other objects directly from PeopleSoft Change Management. It also causes the change to be linked to the defect or case, and provides the ability to drill down into the Change Request from either PeopleSoft HelpDesk or PeopleSoft Quality Management.

Conversely, you can create and link change requests to defects from PeopleSoft Quality Management and to cases from PeopleSoft HelpDesk. Linking from either of these two applications also creates the linkage in PeopleSoft Change Management.

Linking cases and defects also causes status updates to be forwarded to the help desk agent or the quality analyst. You can determine and configure the type and frequency of the updates using AAF policies.

You will not be able to create either a case or a defect from PeopleSoft Change Management. Similarly, no cascading status functionality exists among cases, defects, and change requests.

Interested Parties Page

Interested parties, such as individuals who are not part of the change process by way of an assigned task or role, can receive notifications and updates about the change status through their inclusion on the Interested Parties page.

Users can designate interested parties to receive updates for only specific phases or for all phases.

Interested parties are limited to employees. You can determine and configure the type and frequency of the updates using AAF policies.

Accessing Change Requests

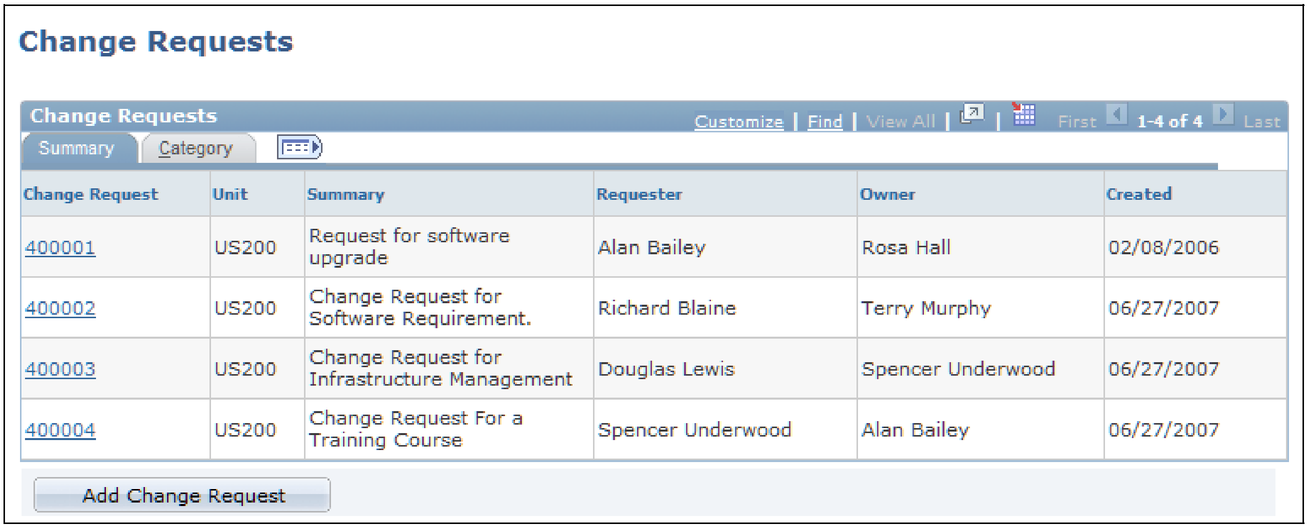
This section discusses how to add new change requests and access existing change requests.

Page Used to Access Change Requests

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Requests search page	RG_CHANGE_SRCH	• HelpDesk, Search Change Requests • Employee Self-Service, HelpDesk, Manage A Change Request • Worker 360 - Degree View, Change Requests, Search Requests	Access existing search requests.

Accessing Existing Change Requests

Access the Change Requests search page (HelpDesk, Search Change Requests).



Change Requests

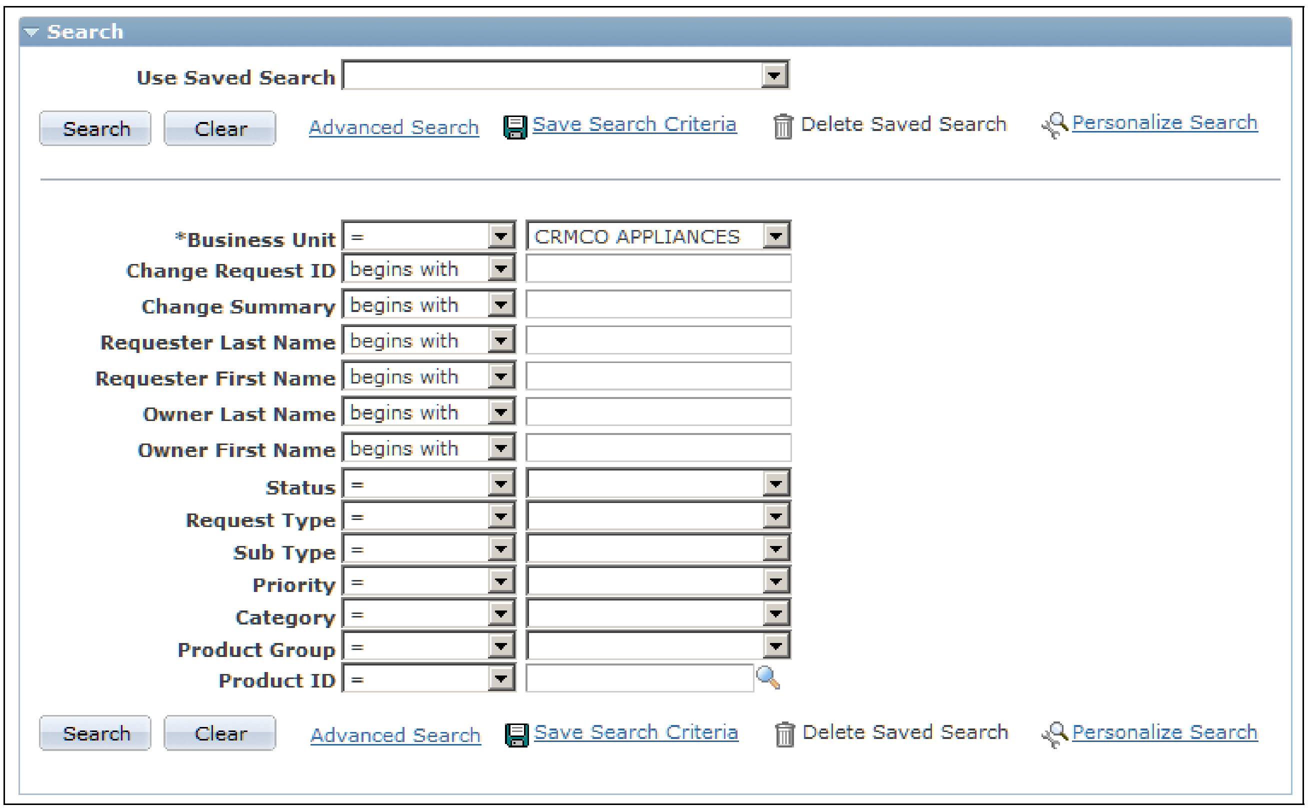
Change Requests — Customize | Find | View All | First 1-4 of 4 Last

Summary | Category

Change Request	Unit	Summary	Requester	Owner	Created
400001	US200	Request for software upgrade	Alan Bailey	Rosa Hall	02/08/2006
400002	US200	Change Request for Software Requirement.	Richard Blaine	Terry Murphy	06/27/2007
400003	US200	Change Request for Infrastructure Management	Douglas Lewis	Spencer Underwood	06/27/2007
400004	US200	Change Request For a Training Course	Spencer Underwood	Alan Bailey	06/27/2007

Add Change Request

Change Requests search page (1 of 2)



Change Requests search page (2 of 2)

If the field that you are looking for to search by does not appear on the basic search page, use the advanced search page or click the Personalize Search link and select any unchecked search fields that you wish to use.

The system displays the Personalize Search Settings page if the system administrator has made this page available to you. You can use this page to select additional fields to appear on the search page.

If you still do not see the field that you are looking for, contact your system administrator. Remember that you can enter part of the whole value in most fields, depending on what operators are set for a given search field. Most of these values are also user defined. They are based on the needs of your organization.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Security and User Preferences," Defining Change Management Preferences

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Search Pages"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Search Pages," Personalizing the Search Page

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Configuring Search Pages," Performing Searches

Managing Basic Change Request Information

This section discusses how to:

- Manage basic change request information.
- Add change requests from employee self-service.
- Manage change requests from employee self-service.

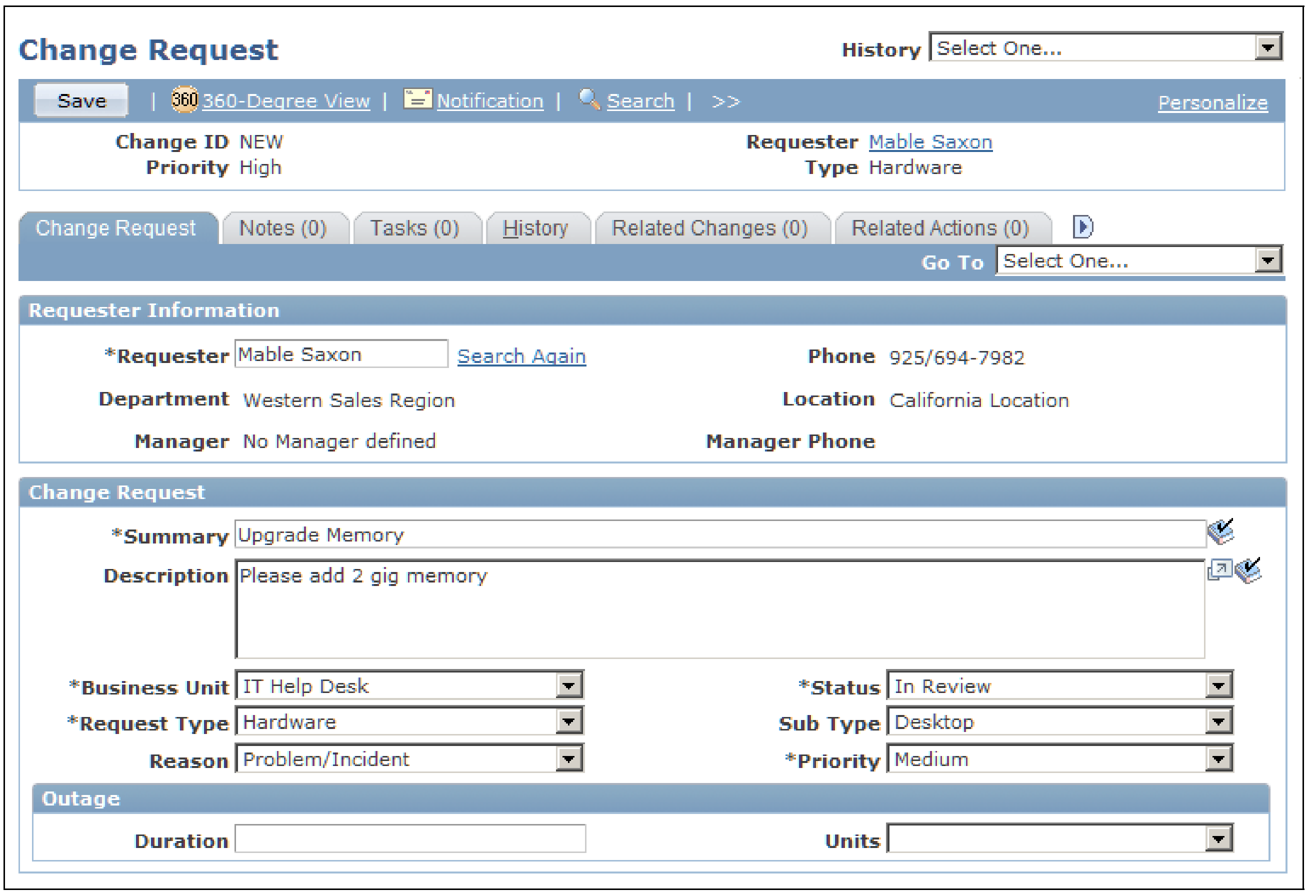
Pages Used to Manage Basic Change Request Information

Page Name	Definition Name	Navigation	Usage
Change Request	RG_CHANGE_REQUEST	• HelpDesk, Add Change Request • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section.	Add new change requests.
Add Change Request	RG_CHANGE_REQ_SS	Employee Self-Service, HelpDesk, Add Change Request	Add new change requests in HelpDesk Self-Service.
Manage Change Requests	RG_CHANGE_SS_SRCH	Employee Self-Service, HelpDesk, Manage A Change Request	Search for and access change requests in HelpDesk Self-Service.

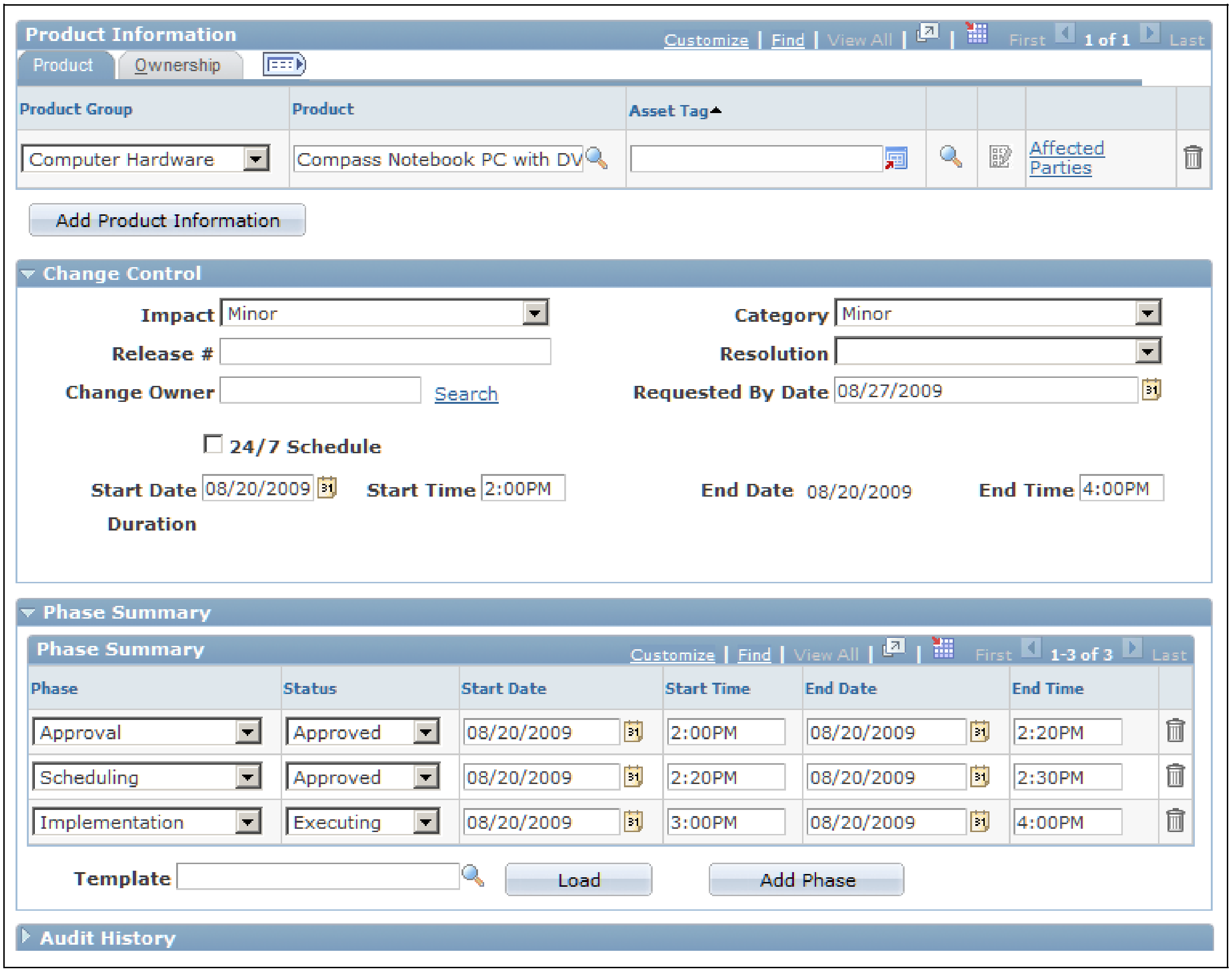
Page Name	***Definition Name***	***Navigation***	***Usage***
Collect Attributes for Change Request	RG_ATTR_PROD_SEC	HelpDesk, Add Change Request Click the Collect Attributes icon on the Manage Product grid of the main Change Request page.	Add or edit attributes to be associated for each installed product on a change request.

Managing Basic Change Request Information

Access the Change Request page (HelpDesk, Add Change Request).



Change Request page (1 of 2)



Change Request page (2 of 2)

Use the fields on this page to define the nature of the change you are proposing.

Use the Change Request section to record basic information associated to a change request, such as a summary, type, reason and priority.

Description Manually enter a description of the change request, or enter a value by selecting a Text Tray value.

Status Enter the status of the change request. Once a change request is associated with a status whose category is *Closed* or *Canceled*, the Audit History section of the page is updated with the date and time of that status change, as well as the userID and name of the person who made that change.

Duration If the change request necessitates a service outage, specify the length of time for that outage in this field.

Units Select the unit of time that applies to the number entered in the Duration field.

Use the Product Information section to manage the products and installed products that are associated to a change request.

Product Group

Select the desired product group.

Product

Select the desired product. This is a required field.

The choices available for product are limited to the appropriate setID, which is derived from the business unit of the change request. If a product group has already been specified, the available options for selecting a product are further limited to those within that product group.

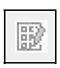
The installed product entry (Asset Tag value) will be defaulted onto the page if one and only one installed product exists for the specified product for the person listed as the Change Requestor.

If you select a product and there are installed product entries associated with the product for multiple people, the system displays a link on far right side of the grid entitled *Affected Parties* to provide you with a way to display who has that product installed. This tells you who may be affected by the change request.

Asset Tag

Enter the desired asset tag number. You may prompt for valid installed product (asset) entries by using the lookup (magnifying glass) icon to the right of this field.

Click the Collect Attributes icon to display the Collect Attributes for Change Request page. The actual format and number of attributes will depend on what attributes (and their associated conditions) have been configured for a change request.



The disabled Collect Attributes icon is displayed if attributes are not enabled for change requests for that installed product. No attribute collection is possible for that row in the grid.

From Owner (located on the Ownership tab of the Product Information grid)

This field will display the current owner of the selected installed product.

To Owner (located on the Ownership tab of the Product Information grid)

Select the person to whom ownership of the installed product should be transferred. This value will default to the change request Requester unless the current owner identified for the installed product is already the Requester.

When a change request is saved with a Status set to a Category of *Closed,* the corresponding installed product entry will be updated with this person's name as the new owner.

Use the Change Control section to record important data associated to a change request, such as the impact, category and change requestor.

Requested By Date

Enter the requested completion date for the change request.

Use the Phase Summary section to manage the phases and tasks that are associated to a change request. Only phases appear in this grid. You can also view tasks and the phases that are associated to them from the Tasks page.

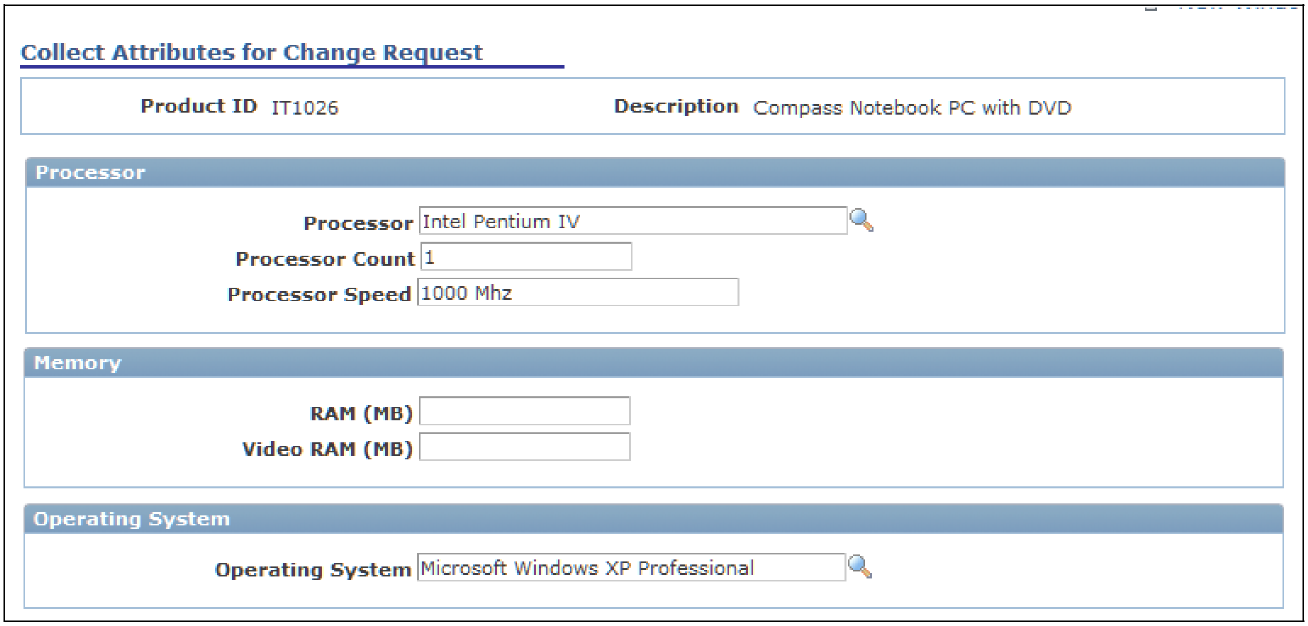
Each phase in the Phase Summary section consists of a task or set of tasks that needs to be completed for a change to be successful. Any required approvals should also be presented in the form of an approval task.

Note. The Text Tray option available on the change request Toolbar enables the user to quickly populate text tray entries into the Description on the main Change Request page.

See Chapter 18, "Using Change Management," Understanding Change Request Management, page 426.

Capturing Change Request Attributes

Access the Change Request - Collect Attributes for Change Request page (HelpDesk, Add Change Request, click the Collect Attributes icon on the Manage Product grid of the main Change Request page).



Change Request: Collect Attributes for Change Request page

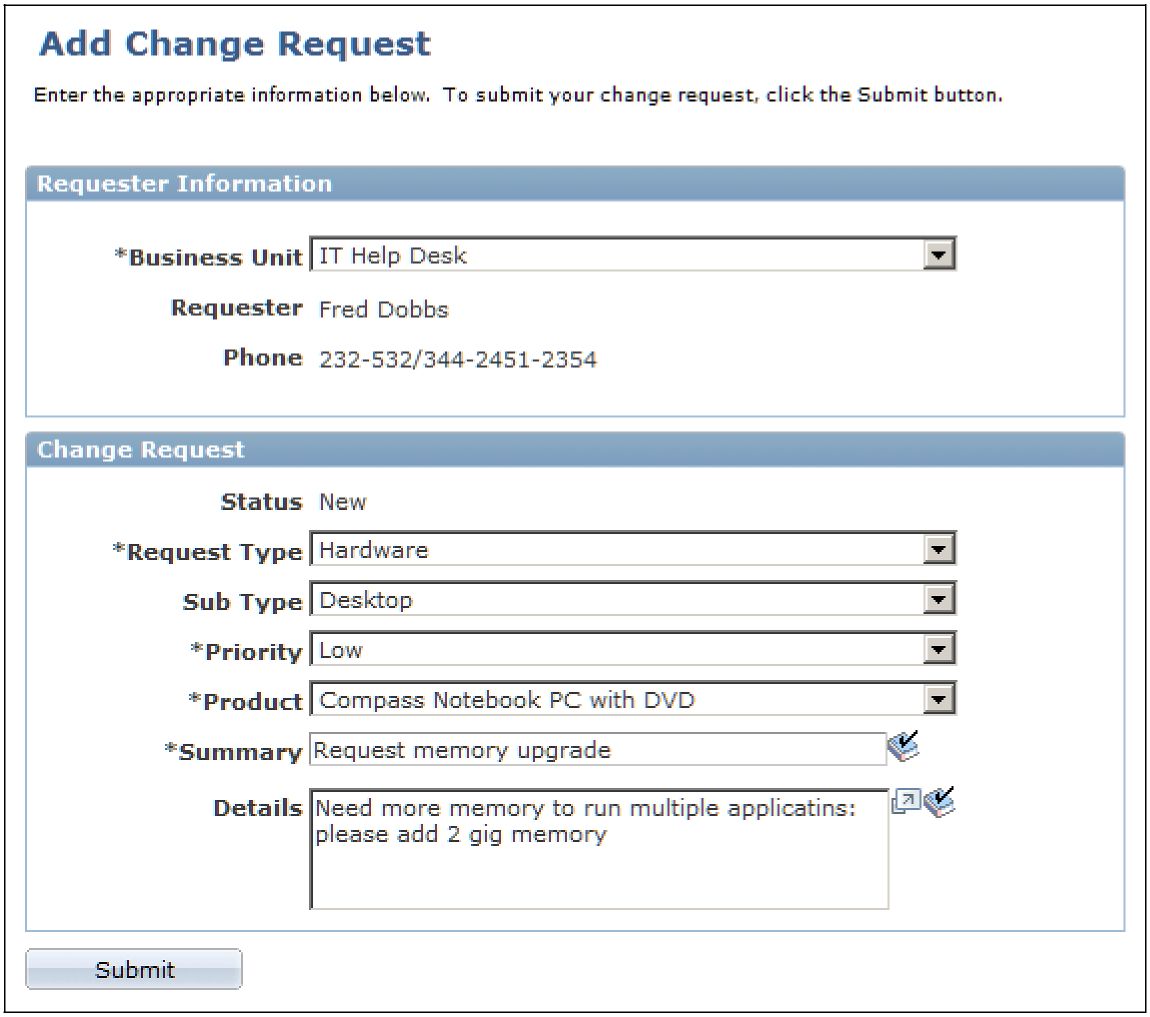
Enter the desired attribute values for each installed product (asset) entry listed on the Change Request page. When a change request is saved with a Status set to a Category of *Closed,* any non-blank attribute values from the change request will be copied to the identically named attributes of the corresponding installed product entry.

Attributes are user-defined and are associated independently to each permitted component. Only attributes that are associated to both the Change Request and Installed Product components (with similar conditions, if any) will be considered when updating the installed product attributes upon saving a closed change request.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Attributes."

Adding Change Requests from Employee Self-Service

Access the Add Change Request page (Employee Self-Service, HelpDesk, Add Change Request).

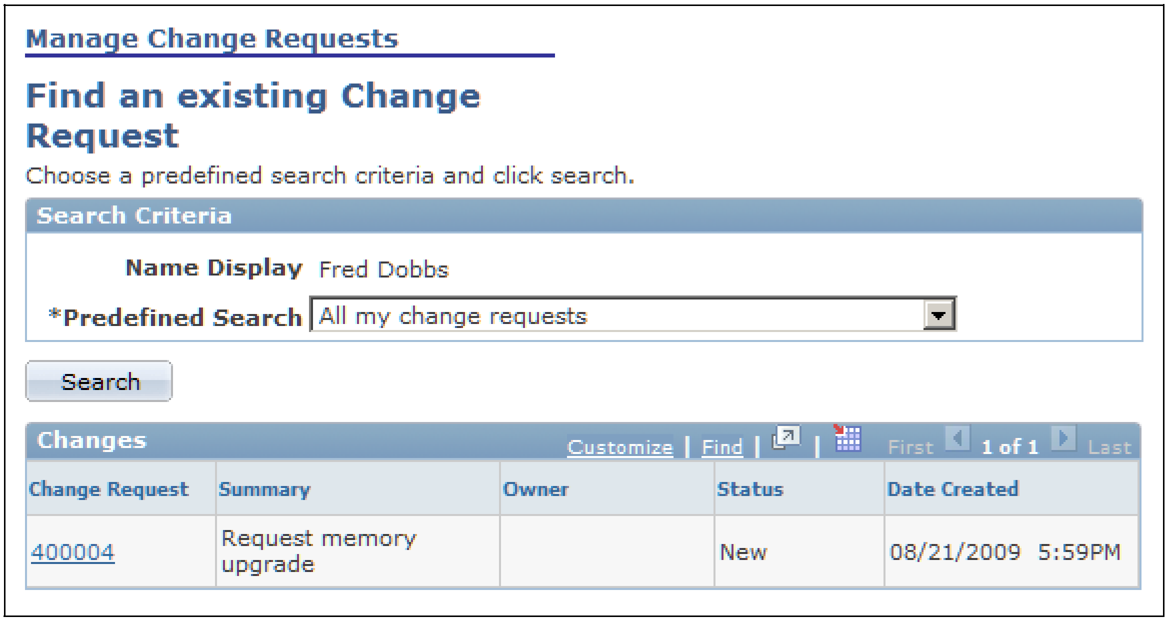


Add Change Request page

Use the fields on this page to define the nature of the change you are proposing. Many of the fields in the Change Request section are dependent on each other in that the values change based on your previous selection. Click Submit when you are finished.

Managing Change Requests from Employee Self-Service

Access the Manage Change Requests page (Employee Self-Service, HelpDesk, Manage A Change Request).



Manage Change Requests page

Select one of the predefined searches from the Predefined Search drop-down list box. Click Search. The system displays the change requests that match the search criteria you selected. Click the link under the Change Request column to access the change request you submitted.

Managing Notes

This section discusses how to:

- Manage notes.
- View notes and attachments.

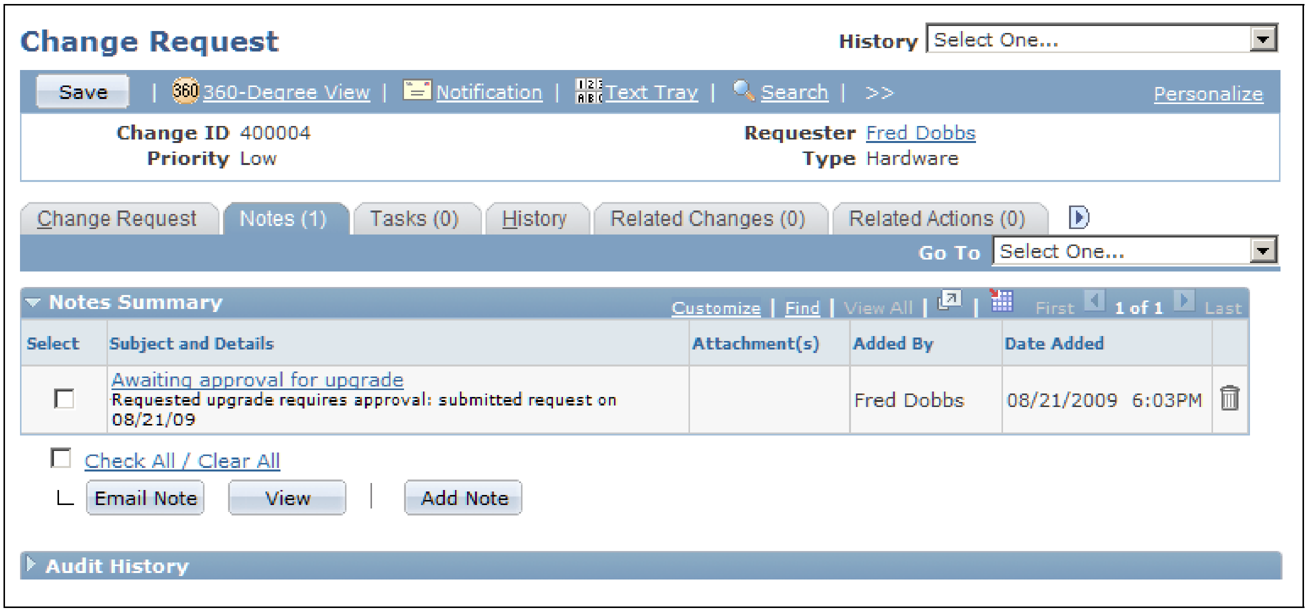
Pages Used to Manage Notes

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Request - Notes	RG_CHANGE_NOTE	• HelpDesk, Add Change Request Click the Notes tab. • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Notes page.	Add notes and attachments to change requests.

Page Name	***Definition Name***	***Navigation***	***Usage***
View Note	RB_VIEW_NOTE_SEC	Select the notes you want to view and then click the View button on the Change Request - Notes page.	View the content of notes and attachments related to the change request.

Managing Notes

Access the Change Request - Notes page (HelpDesk, Add Change Request, click the Notes tab).



Change Request: Notes page

When adding a new note to the change request, the note Description field may be populated using a Text Tray entry.

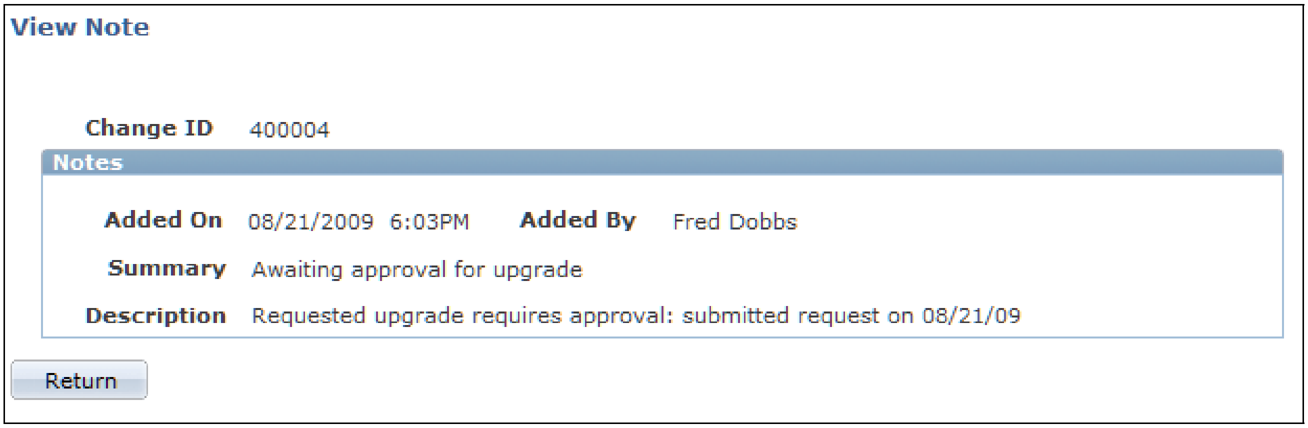
Notes functionality is similar across all PeopleSoft CRM applications. For instructions on using the Notes page, refer to the following PeopleBook:

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

Viewing Notes and Attachments

Access the View Note page (select a note and click the View button on the Change Request - Notes page).



View Note page

Note. Use this page to view notes and attachments related to the change request. Click Return to go back to the Notes page.

Managing Tasks

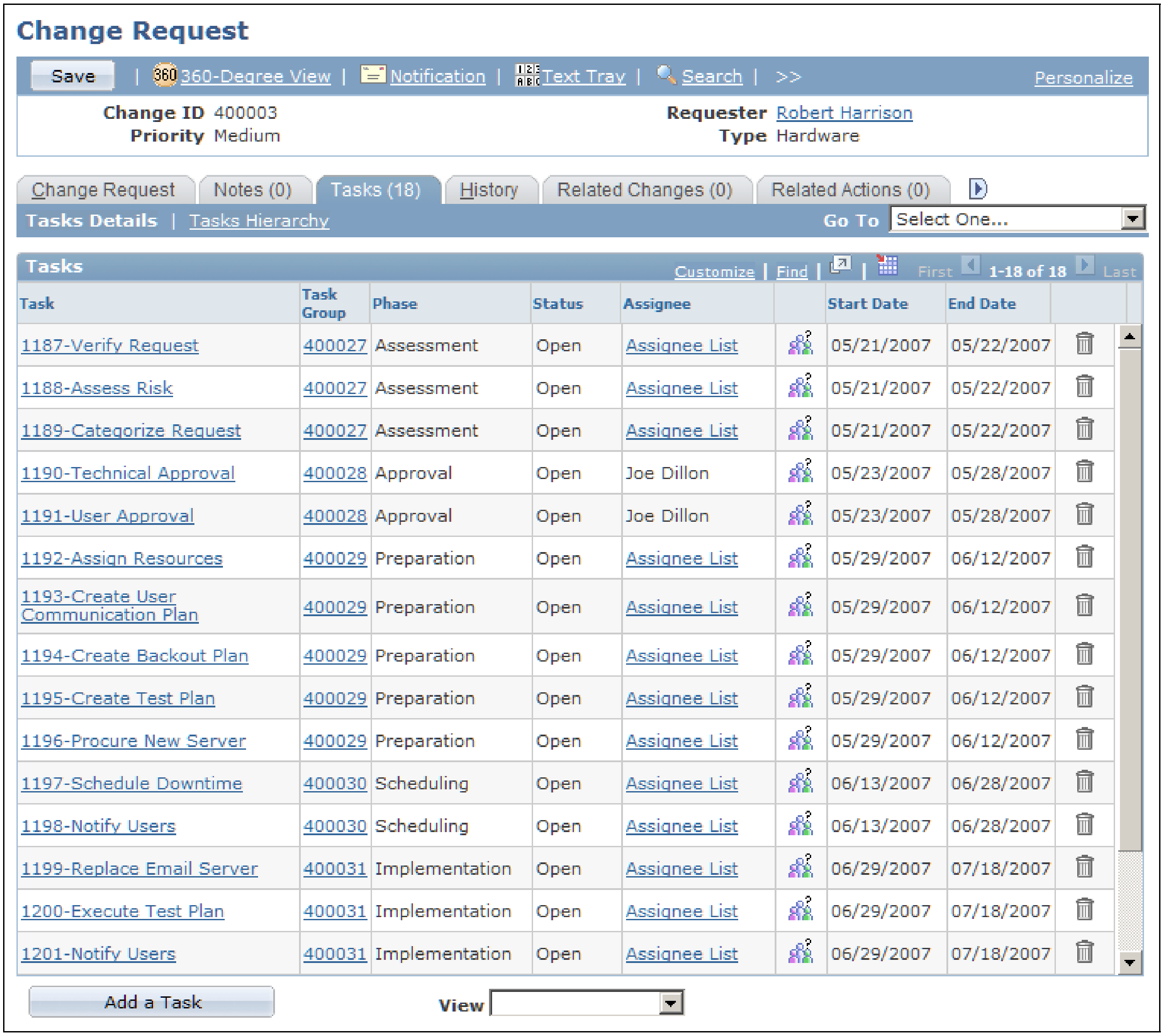
This section discusses how to manage tasks.

Page Used to Manage Tasks

Page Name	*Definition Name*	*Navigation*	*Usage*
Change Request - Tasks	RG_CHG_TASKS	• HelpDesk, Add Change Request Click the Tasks tab. • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Tasks tab.	Manage tasks in PeopleSoft Change Management.

Managing Tasks

Access the Change Request - Tasks page (HelpDesk, Add Change Request, click the Tasks tab).



Change Request: Tasks page

Adding tasks in PeopleSoft Change Management is similar to the process that is used in PeopleSoft Support and HelpDesk. For instructions on using the Tasks page refer to these PeopleBook sections:

See Chapter 11, "Processing Cases," Adding Tasks to a Case, page 313.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Using Business Projects," Managing Tasks.

Reviewing Change Request History

This section provides an overview of change request history and discusses how to:

- View the event history of a change request.

- View the audit trail of a change request.

Understanding Change Request History

The Change Request History page includes an Events subpage and an Audit subpage:

- Change request history provides a summary of the major events in the life cycle of a change request.
- Change request auditing complements change request history processing by providing an automated mechanism for keeping a detailed change history without cluttering the Change Request History page.

Some overlap is acceptable in the data that these pages capture.

Change Request History Page

This page displays information about major events in the life of the change request, including a description of the event and details of any field changes that are associated with the event. The following mechanisms insert data into the change request history table:

- Change Request History AAF policy.

  At save time, the system evaluates record- and field-level conditions that you define. When the condition is true, the system adds a row of change request history data.

- Workflow AAF policy (including service-level workflow).

  The system triggers a workflow action under conditions that you define. The event processing definition includes a check box that you select if you want to create change request history when the workflow is triggered.

- Manual notifications.

  The system adds change request history whenever a user sends a manual notification from the change request.

  See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Sending Manual Notifications."

Audit History Page

This page displays record-level changes to change request data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). However, there is no conditional logic to evaluate the before and after values of the field. The system captures all audited actions regardless of the field value.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Auditing for Cases and Inbound Email"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Interactions"

Prerequisite

Your organization must define event sets that tell the system which events to capture on the Change Request - History page.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Setting Up Auditing for Cases and Inbound Email"

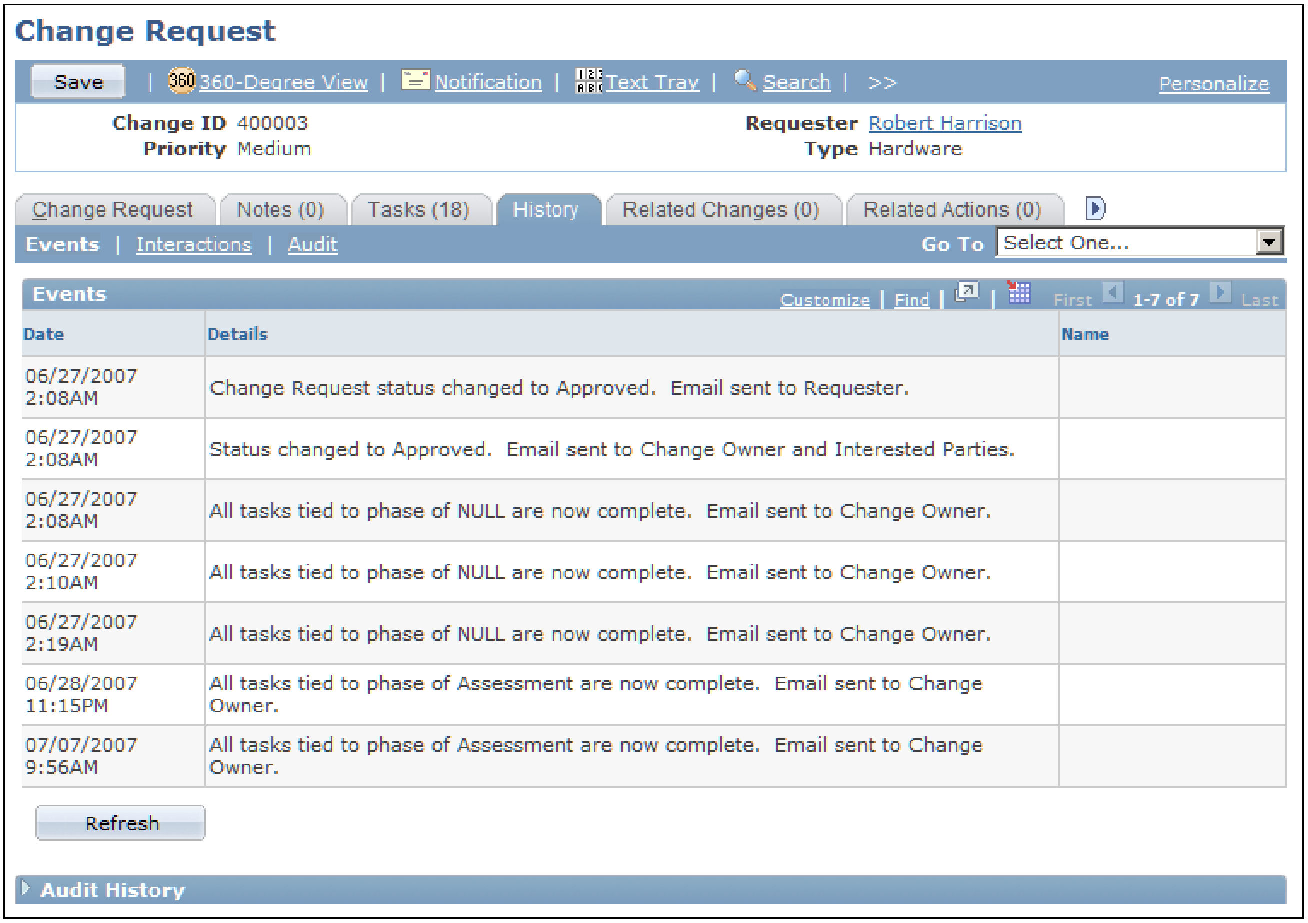
PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework," Configuring Case History Actions

Pages Used to Review Change Request History

Page Name	*Definition Name*	*Navigation*	*Usage*
Change Request History - Events	RG_CHG_HISTORY	• HelpDesk, Add Change Request Select the Show more tabs button and then click the History page. • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section. Select the Show more tabs button. Select the History page.	View a summary of important events in the life cycle of a change request.
Change Request History - Audit	RG_CHG_HISTORY	Click the Audit link on the Change Request History page.	View detailed information about changes to specific fields in the change request.

Viewing the Event History of a Change Request

Access the Change Request History - Events page (HelpDesk, Add Change Request, select the Show more tabs button and then click the History page).



Change Request History - Events page

Audit

Click to display the Audit History page.

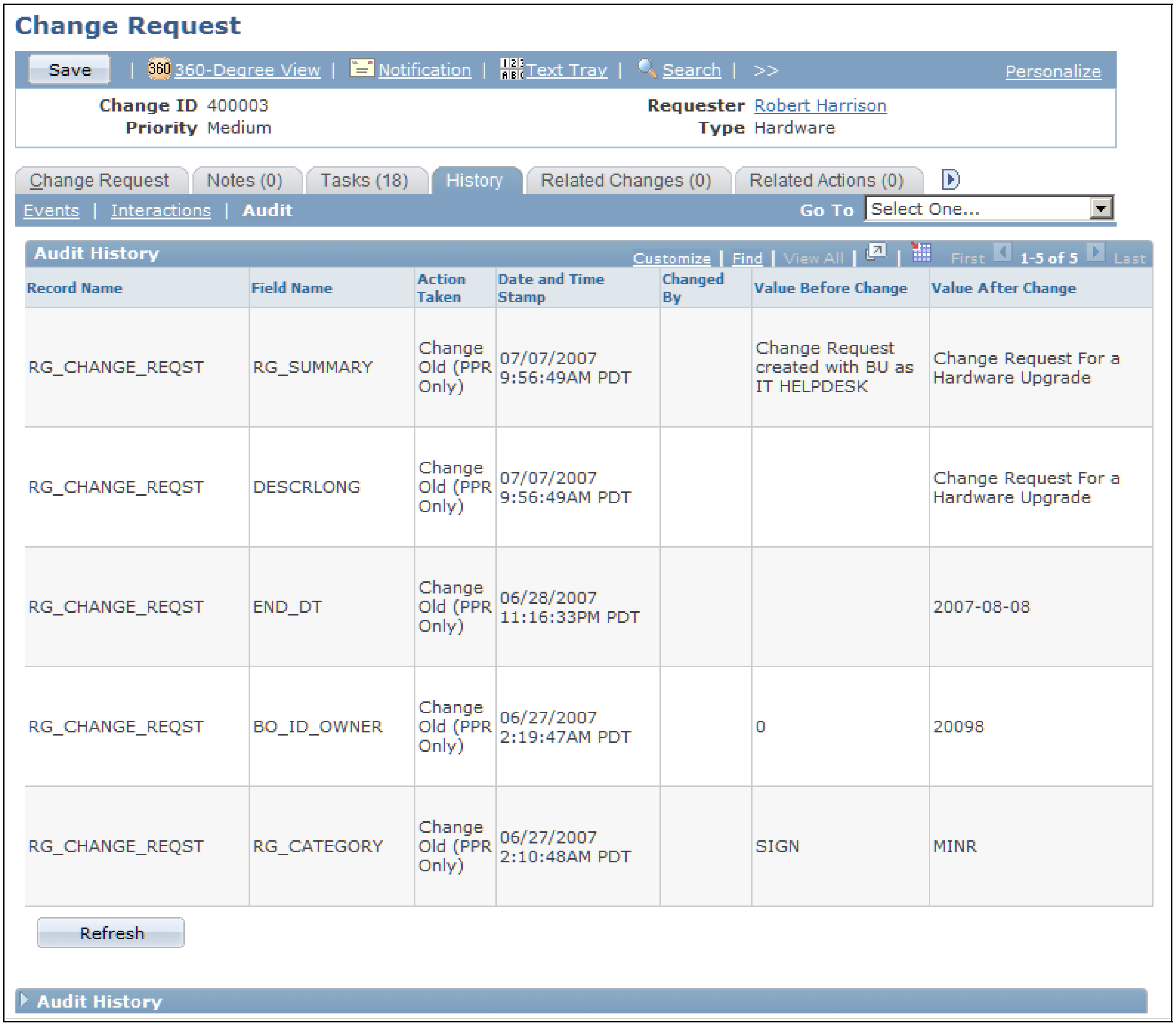
Events

Describes the event.

These fields are either populated through AAF processing or whenever a user sends a manual notification from the change request.

Viewing the Audit Trail of a Change Request

Access the Change Request History - Audit page (click the Audit link on the Change Request History page).



Record Name	Field Name	Action Taken	Date and Time Stamp	Changed By	Value Before Change	Value After Change
RG_CHANGE_REQST	RG_SUMMARY	Change Old (PPR Only)	07/07/2007 9:56:49AM PDT		Change Request created with BU as IT HELPDESK	Change Request For a Hardware Upgrade
RG_CHANGE_REQST	DESCRLONG	Change Old (PPR Only)	07/07/2007 9:56:49AM PDT			Change Request For a Hardware Upgrade
RG_CHANGE_REQST	END_DT	Change Old (PPR Only)	06/28/2007 11:16:33PM PDT			2007-08-08
RG_CHANGE_REQST	BO_ID_OWNER	Change Old (PPR Only)	06/27/2007 2:19:47AM PDT		0	20098
RG_CHANGE_REQST	RG_CATEGORY	Change Old (PPR Only)	06/27/2007 2:10:48AM PDT		SIGN	MINR

Change Request History - Audit page

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting).

Managing Related Changes

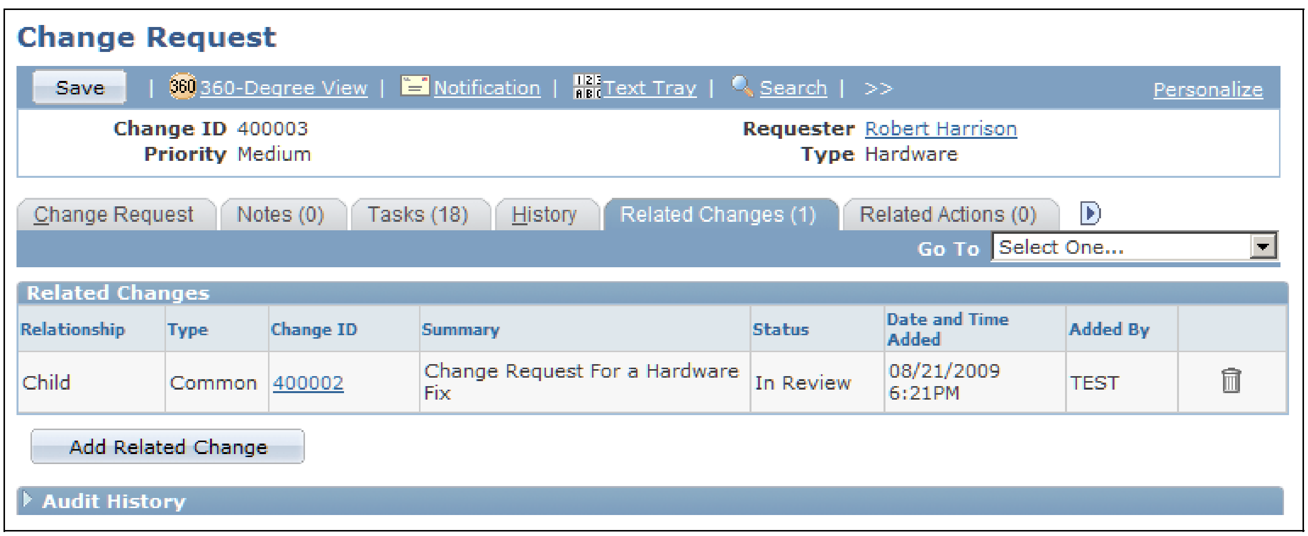
This section discusses how to manage related changes.

Page Used to Manage Related Changes

Page Name	*Definition Name*	*Navigation*	*Usage*
Change Request - Related Changes	RG_REL_CHANGES	• HelpDesk, Add Change Request Click the Related Changes tab. • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Related Changes page.	Relate your change request to another change request.

Managing Related Changes

Access the Change Request - Related Changes page (HelpDesk, Add Change Request, click the Related Changes tab).



Change Request: Related Changes page

Managing related changes in PeopleSoft Change Management is similar to the process that is used to manage related cases, which is described the documentation for PeopleSoft Support and HelpDesk. For instructions on using the Related Changes page, refer to this PeopleBook:

See Also

Chapter 11, "Processing Cases," Managing Related Cases, page 322

Managing Related Actions

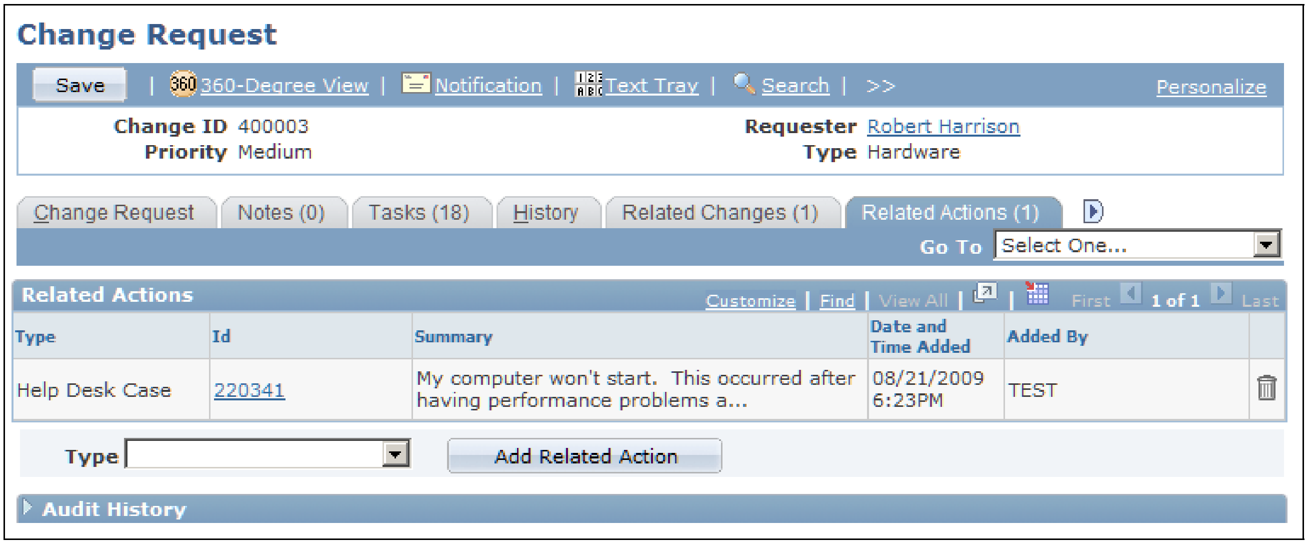
This section discusses how to manage related actions.

Page Used to Manage Related Actions

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Request - Related Actions	RG_REL_OBJECTS	• HelpDesk, Add Change Request Click the Related Actions tab. • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Related Actions page.	Relate actions to the change request.

Managing Related Actions

Access the Change Request - Related Actions page (HelpDesk, Add Change Request, click the Related Actions tab).



Change Request - Related Actions page

Managing related actions in PeopleSoft Change Management is similar to the process that is used to manage related actions in PeopleSoft Support and HelpDesk. For instructions on using the Related Actions page, refer this PeopleBook:

See Also

Chapter 11, "Processing Cases," Managing Related Actions, page 333

Managing Interested Parties

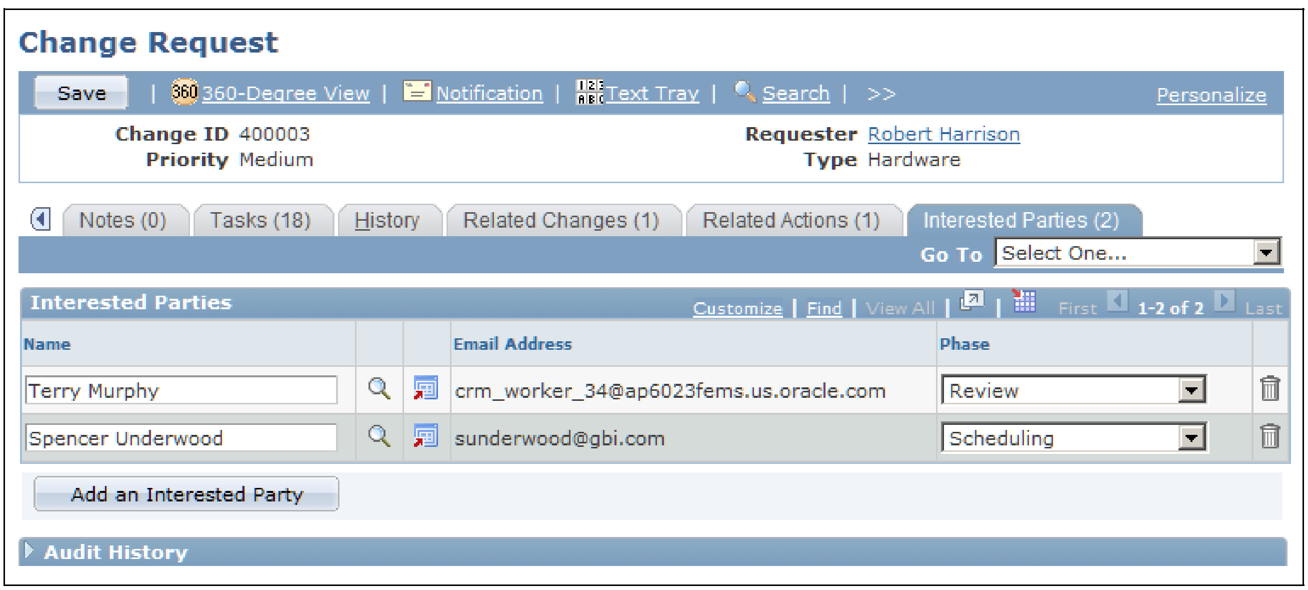
This section discusses how to manage interested parties for a change request.

Pages Used to Manage Interested Parties

Page Name	***Definition Name***	***Navigation***	***Usage***
Change Request - Interested Parties	RG_CHG_INT_PARTY	• HelpDesk, Add Change Request Click the Interested Parties tab. • HelpDesk, Add Case Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Interested Parties page.	Manage interested parties in a change request.

Managing Interested Parties in Change Management

Access the Change Request - Interested Parties page (HelpDesk, Add Change Request, click the Interested Parties tab).



Change Request - Interested Parties page

Managing interested parties in PeopleSoft Change Management is similar to the process that is used to manage interested parties in PeopleSoft Support and HelpDesk. For instructions on using the Interested Parties page, refer to this PeopleBook.

See Also

Chapter 11, "Processing Cases," Identifying Interested Parties, page 354

Chapter 19

Managing Defects and Fixes

This chapter provides an overview of defect and fix tracking and discusses how to:

- Enter defects.
- Record fixes and link them to defects.

Understanding Defect and Fix Tracking

Flaws and functional shortcomings can occur in all products. Within PeopleSoft Quality Management, both product flaws and proposed enhancements are *defects,* and resolutions to both are *fixes.*

Use PeopleSoft Quality Management to track reported defects and enhancement requests and to record how requests are resolved. Automated worklist assignments and notifications move the defect through the resolution process. Managers, engineers, call center operators, and others can use the search tool to quickly identify and access records.

Use PeopleSoft Quality Management to:

- Identify defects associated with particular products or components.
- Monitor the progress of defects as they move forward to resolution.
- Advise support personnel and customers about fixes that have not yet been applied.
- Identify component problems affecting multiple products or versions.
- Log product enhancement requests made by customers and quality assurance engineers.
- Monitor requirements for quality certification processes such as ISO 9000.
- Measure product quality, identify defect trends, and assess customer satisfaction.

You can maintain a record of fixes to facilitate quick resolutions to similar defects and related cases. Use the record of fixes to:

- Reduce the possibility of fixing the same problem twice.
- Provide links to other defect records and quickly identify similar problems.
- Provide a detailed history of when a defect was fixed, the effort involved, and the versions affected.

Entering Defects

This section discusses how to:

- Define defects.
- Add notes and attachments to a defect.
- Link defects to fixes.
- Work with solutions.
- Identify affected products.
- Add interested parties.
- Link related cases and change requests.
- View related defects.
- Link related defects.
- Identify tested environments.
- View workflow history.

Pages Used to Enter Defects

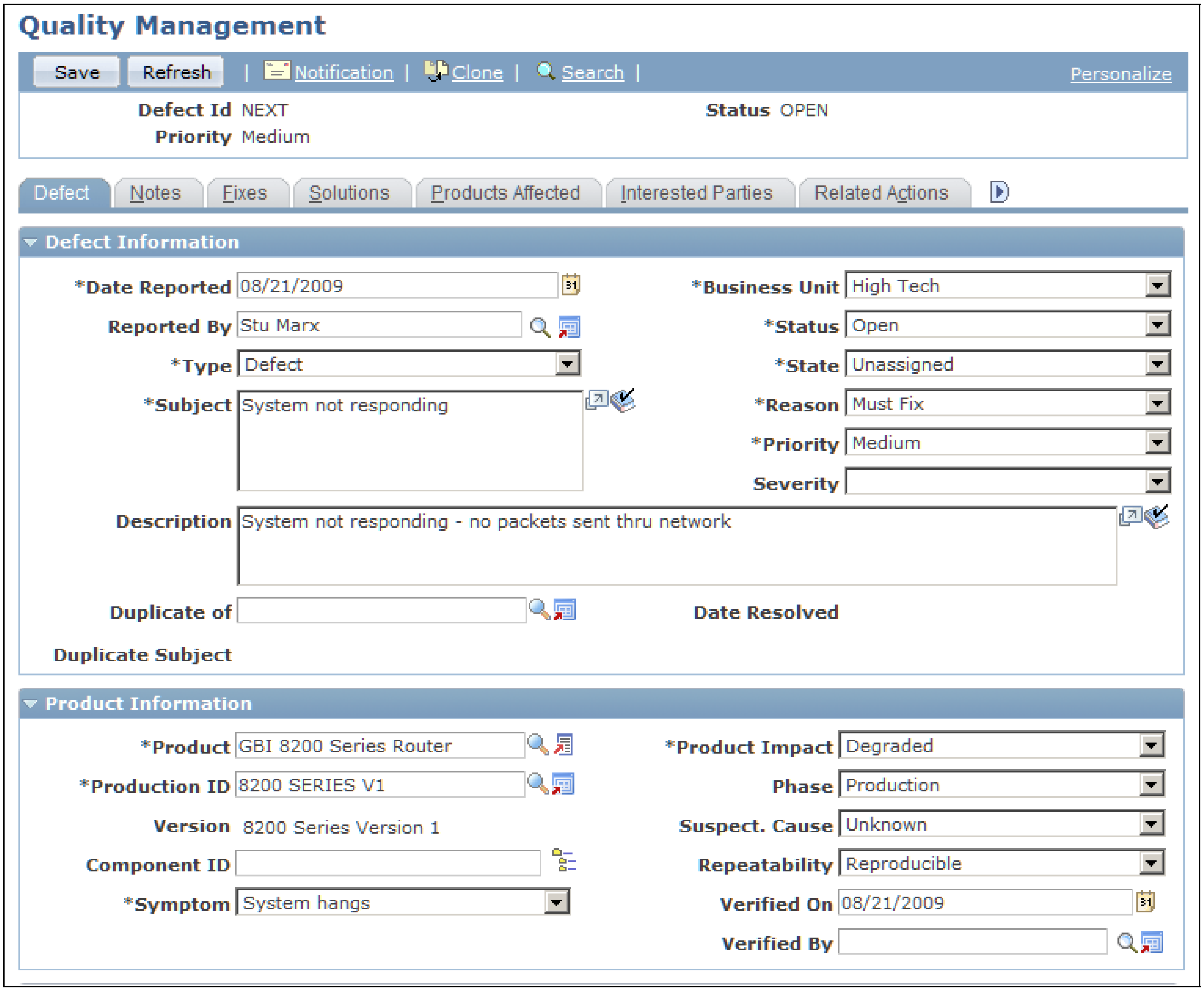
Page Name	*Definition Name*	*Navigation*	*Usage*
Quality Management - Defect	RQ_DEFECT_MAIN	Quality Management, Add Defect, Defect Quality Management, Search Defects, Defect	Enter detailed information about the defect, product, responsible parties, interested parties, environment, and defect resolution.
Quality Management - Notes	RQ_DEFECT_NOTE	Quality Management, Add Defect, Notes Quality Management, Search Defects, Notes	Add notes and attachments to a defect, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.
Quality Management - Fixes	RQ_DEFECT_FIX_LNKS	Quality Management, Add Defect, Fixes Quality Management, Search Defects, Fixes	Link new or existing fixes to a defect.

Page Name	*Definition Name*	*Navigation*	*Usage*
Quality Management - Solutions	RQ_DEFECT_SOL_LNK2	Quality Management, Add Defect, Solutions Quality Management, Search Defects, Solutions	Search for solutions to the defect or problem.
Quality Management - Products Affected	RQ_DEFECT_AFFD_PRD	Quality Management, Add Defect, Products Affected Quality Management, Search Defects, Products Affected	Identify and enter information about additional products that are affected by the defect. You can list multiple products.
Quality Management - Interested Parties	RQ_DEFECT_INTR	Quality Management, Add Defect, Interested Parties Quality Management, Search Defects, Interested Parties	Identify people who want to be notified regarding defect resolution progress.
Quality Management - Related Actions	RQ_DEF_CASE_LNK	Quality Management, Add Defect, Related Actions Quality Management, Search Defects, Related Actions	Link the defect to related support or help desk cases.
Quality Management - Related Defects	RQ_DEF_RELATIONS	Quality Management, Add Defect, Related Defects Quality Management, Search Defects, Related Defects	View information about related defects, associate defects that can be resolved by the same fix, and identify defects that must be resolved in a particular sequence.
Relate Existing Defect - Relationship	RQ_REL_TYPE_SEC	Quality Management, Add Defect, Related Defects. Click the Relate Existing Defect button. Quality Management, Search DefectsClick the Relate Existing Defect button.	Specify how defects are related to one another.
Quality Management - Tested Environments	RQ_DEFECT_TEST_ENV	Quality Management, Add Defect, Tested Environments Quality Management, Search Defects, Tested Environments	Identify and enter information about the environments in which the defect will be tested.

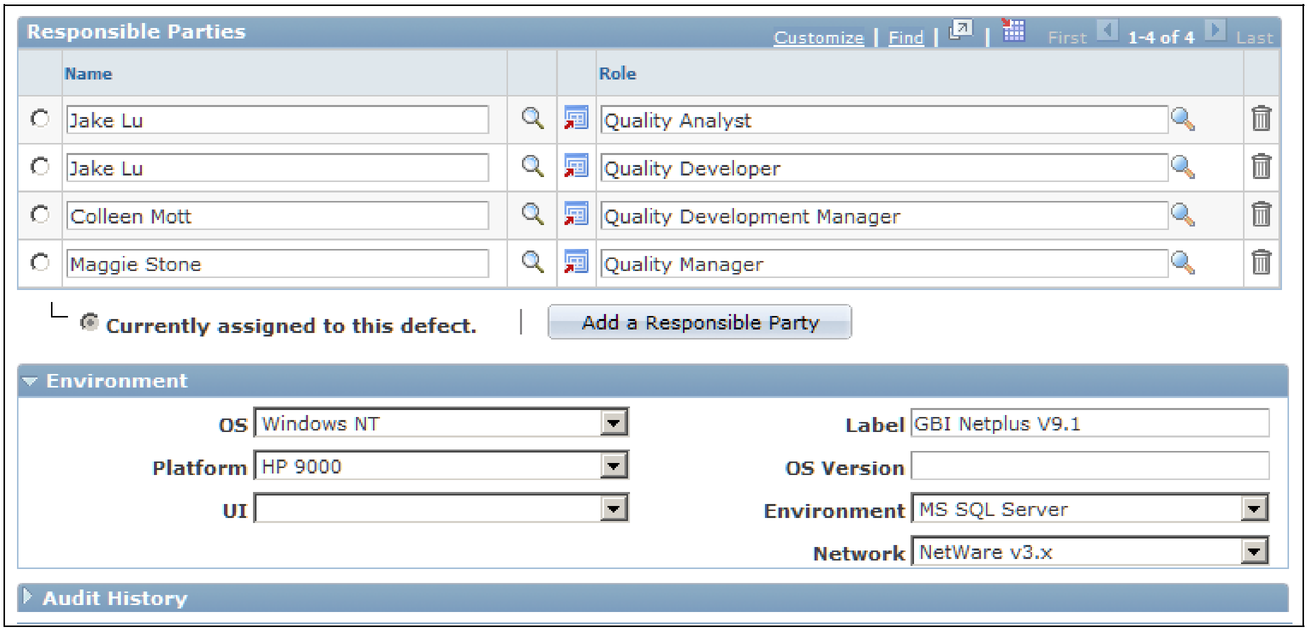
Page Name	***Definition Name***	***Navigation***	***Usage***
Quality Management - Workflow History	RQ_WL_ACTN_HISTORY	Quality Management, Add Defect, Workflow History Quality Management, Search Defects, Workflow History	View workflow status and priority history resulting from worklist notifications.

Defining Defects

Access the Quality Management - Defect page (Quality Management, Add Defect, Defect).



Quality Management - Defect page (1 of 2)



Quality Management - Defect page (2 of 2)

The Quality Management - Defect page contains information relevant to problem reporting and resolution. As the defect moves through to the resolution process, you can track its status on this page.

Defect Information

Date Reported

Enter the date on which the defect or enhancement request is reported.

Reported By

Select the name of the person reporting the defect or enhancement request. The name of the user who opened the defect issue appears by default.

Type

Select a type. Values are:

Defect: Relates to a problem or malfunction. The standard response to a defect is a fix.

Enhancement: Relates to a request for new functionality. The standard response to this request is an enhancement.

Subject

Enter details about the defect being reported.

Status

Select the status of the defect or enhancement request. PeopleSoft delivers *Open* and *Closed.* You can define other options during setup.

State

Select a state that more fully describes your status selection. The system delivers several options. You can change these options or define others during setup. Available states are dynamic depending on the selected status.

Reason

Select a reason that further describes the status and state selections. Available reasons are dynamic depending on the selected status and state.

Priority Select a priority for the defect. PeopleSoft delivers*High*,*Low,* and *Medium* with the system.

Severity Select the severity of the defect. PeopleSoft delivers*High*,*Low,* and *Medium* with the system.

Duplicate of If similar defect or enhancement requests already exist, select the principal defect here to designate the current defect as a duplicate of the principal defect.

For example, if, after creating a new defect record, you find that a defect has already been reported but not described in quite the same way, specify the current record as a duplicate of the previous record and change the status of the current record to closed.

Product Information

Product Select the product to which the defect or enhancement request relates.

Note. Only products with a valid version definition, established in PeopleSoft Quality Management setup, appear in the search. If a product does not appear, a version for that product must be established in setup.

Production ID Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search. When you select a valid production ID, the system automatically fills in the version in the Version field.

Version Once a user selects a production ID, the system automatically displays the version label.

Component ID Click the Component Hierarchy button to access the Component Descriptions page and select the appropriate component.

Symptom Select a symptom that may have alerted you to the defect. Define symptoms in PeopleSoft Quality Management setup.

Product Impact Describe the impact of the defect on your component. Values are: *Affected* **-** *Use Workaround, Degraded, Unaffected,* and *Unusable.*

Phase Select the production phase in which the product failure or enhancement request occurred. Values are: *Alpha, Analysis/Design, Beta, Concept, Implementation, Maintenance, Production, Requirements,* and *Retirement.*

Suspect. Cause (suspected cause) Select a suspected cause of the defect. Define suspected causes in PeopleSoft Quality Management setup.

Repeatability Select the regularity with which the failure can be reproduced. Values are: *Intermittent, One time occurrence, Recurring,* and *Reproducible.*

Responsible Parties

Responsible parties are those who take the lead for one or more steps in the defect resolution process and are linked to the product version definition during version setup. These values are automatically populated when a user selects the product version. You can add or delete responsible parties as needed.

You can use information about responsible parties to control search functions and role-related workflow. To modify workflow processing use AAF policies.

Currently assigned to this defect

Select this option to indicate who is responsible for the defect's progress at any point. For example, if the current state of the defect resolution is *To Test,* the person assigned would be the quality analyst. When defined, the system sends workflow messages as the status is changed and saved.

Note. Selecting an assignment is a manual process. You can select only one name as the responsible party at any point. As the defect-resolution process progresses, the responsible party changes.

Add a Responsible Party

Click to add a new row to the Responsible Parties grid.

Environment

This section is used primarily for software problems.

OS (operating system)

Select the operating system of the environment in which the product failed if it is not automatically populated, or to modify operating system information.

Label

Enter the environment information that is linked to the version during version setup.

Note. If there are multiple environment sets linked to a version, the Select an Environment button appears. Also, if only one environment exists that is linked to the versions, the system automatically inserts values into the fields on the page.

Platform

Select the type of computer on which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify platform information.

OS Version (operating system version)

Enter the version of the environment in which the product failed if it is not automatically populated, or to modify operating system information.

UI (user interface)

Select the type of user interface through which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify user interface information.

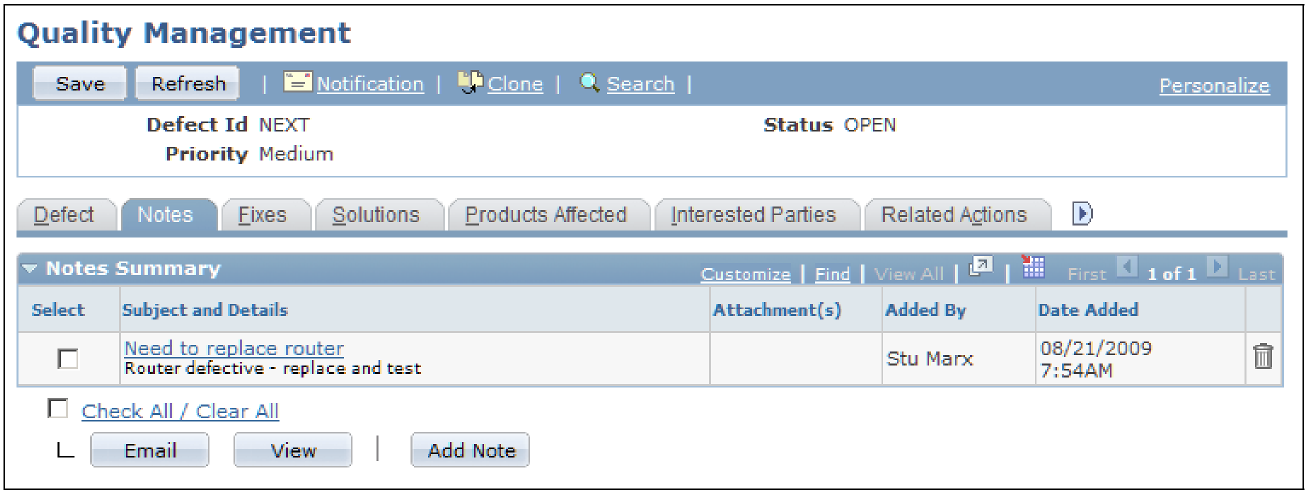
Environment

Select the database management environment in which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify environment information.

Network Select the type of network on which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify network information.

Adding Notes and Attachments to a Defect

Access the Quality Management - Notes page (Quality Management, Add Defect, Notes).



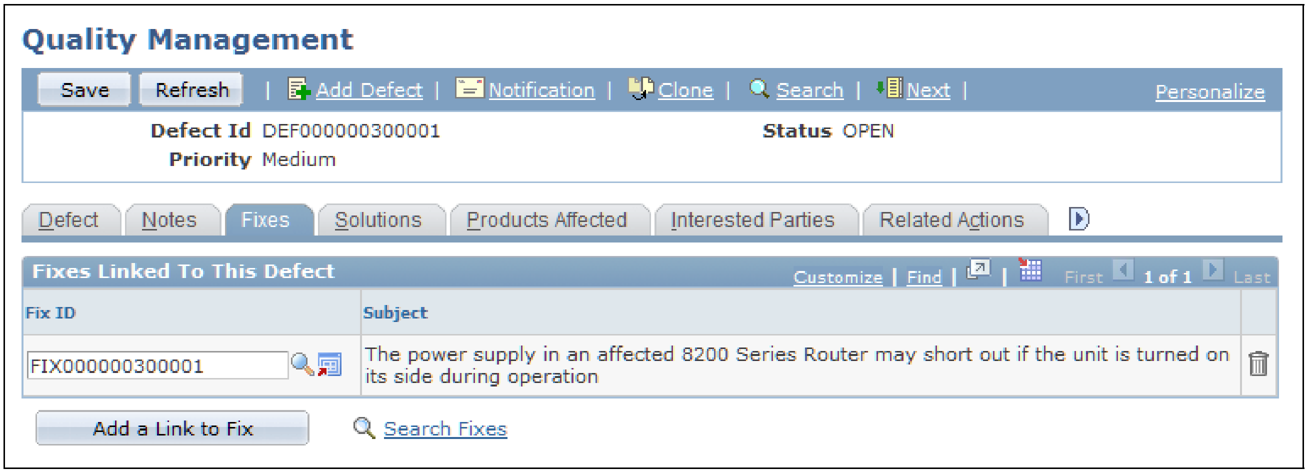
Quality Management - Notes page

The process of adding notes and attachments is similar across all PeopleSoft applications. For instructions on adding notes and attachments, refer to this PeopleBook:

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Linking Defects to Fixes

Access the Quality Management - Fixes page (Quality Management, Add Defect, Fixes).



Quality Management - Fixes page

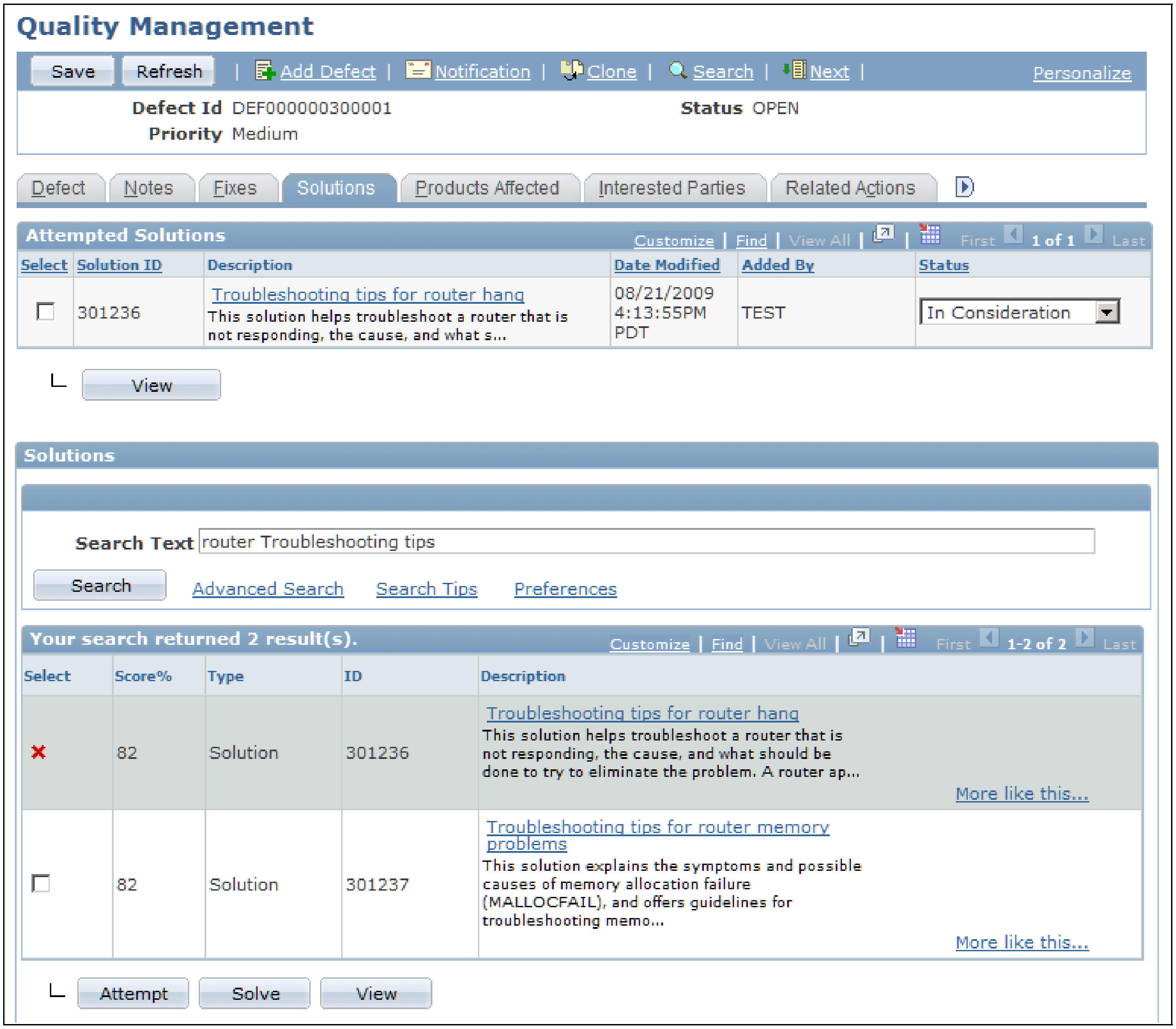
As fixes are implemented to resolve the defect, use the Quality Management - Fixes page to both create a fix and link the defect to the fix. This provides an immediate link to all fixes that resolve the defect in full or in part. Alternately, link the defect to the fix using the Quality Management - Defects page in the Fix component. Having fix information linked to a defect record enables call center operators to refer customers to available fixes that might not have been installed.

Searching for fixes uses the Verity search engine. To use this feature, you first need to build the search collection *CRM_RB_DEFECTFIX*.

Subject	Displays the subject description associated with the fixes linked to this defect. The system populates this field with the subject information that you entered on the Quality Management - Fix page in the Fix component.

Working with Solutions

Access the Quality Management - Solutions page (Quality Management, Add Defect, Solutions).



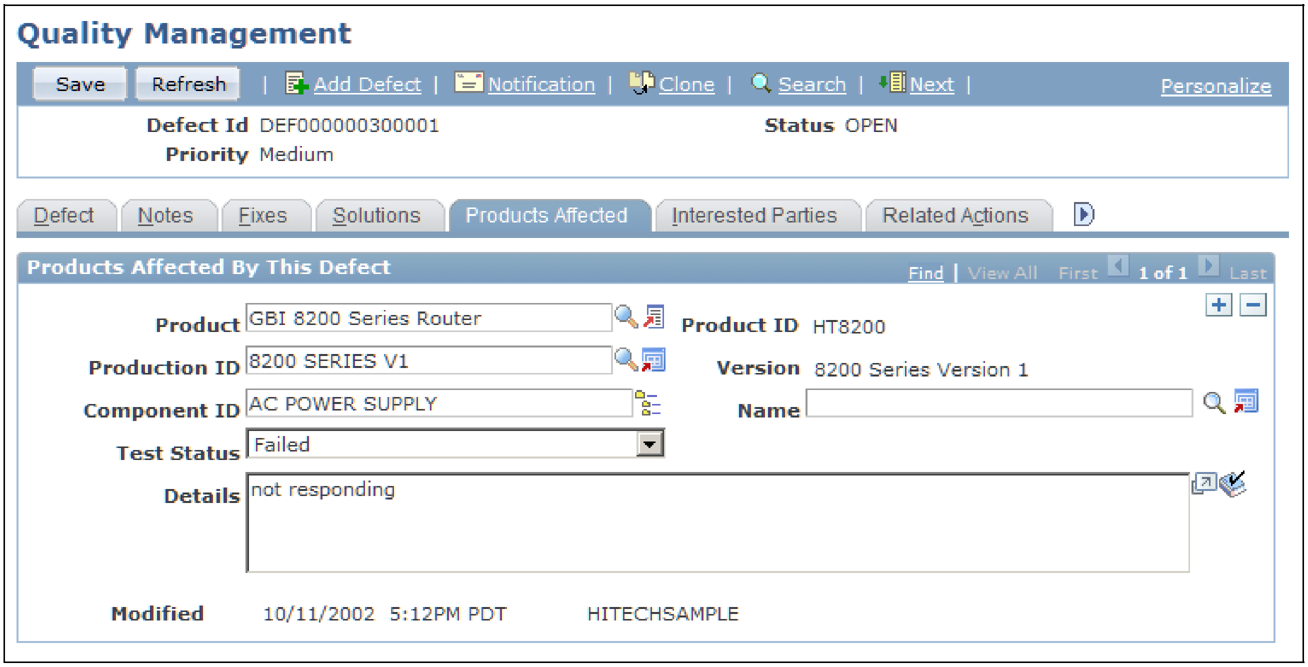
Quality Management - Solutions page

PeopleSoft CRM call center, field service and quality management applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook*, "Using Solutions."

Identifying Affected Products

Access the Quality Management - Products Affected page (Quality Management, Add Defect, Products Affected).



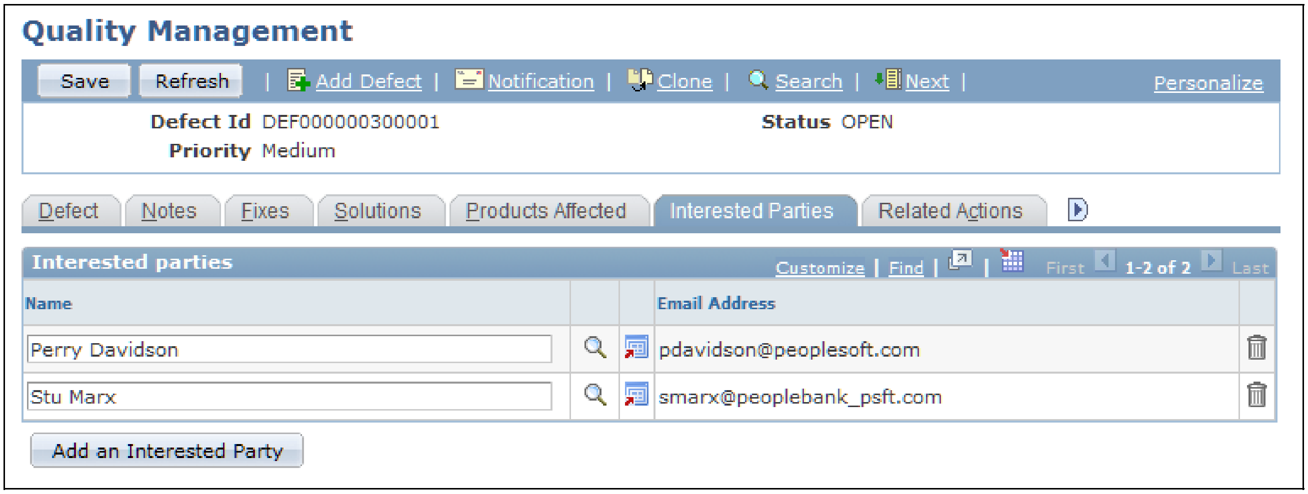
Quality Management - Products Affected page

Complete this page if this defect or enhancement affects other products or components. For example, if you have a product that more than one appliance uses, use this page to list all appliances that contain the product.

Product	Select the product in which the defect is found.
Product ID	Once you select a product, the system displays the product ID.
Production ID	Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.
Version	Once you select a production ID, the system displays the version label.
Component ID	Select the appropriate component for this product and version.
Name	Select the name of the person who found the defect.
Test Status	Select the test status. Values are: *Failed*, *Not Tested*, and *Passed.*
Details	Describe the impact of the defect on the component.

Adding Interested Parties

Access the Quality Management - Interested Parties page (Quality Management, Add Defect, Interested Parties).

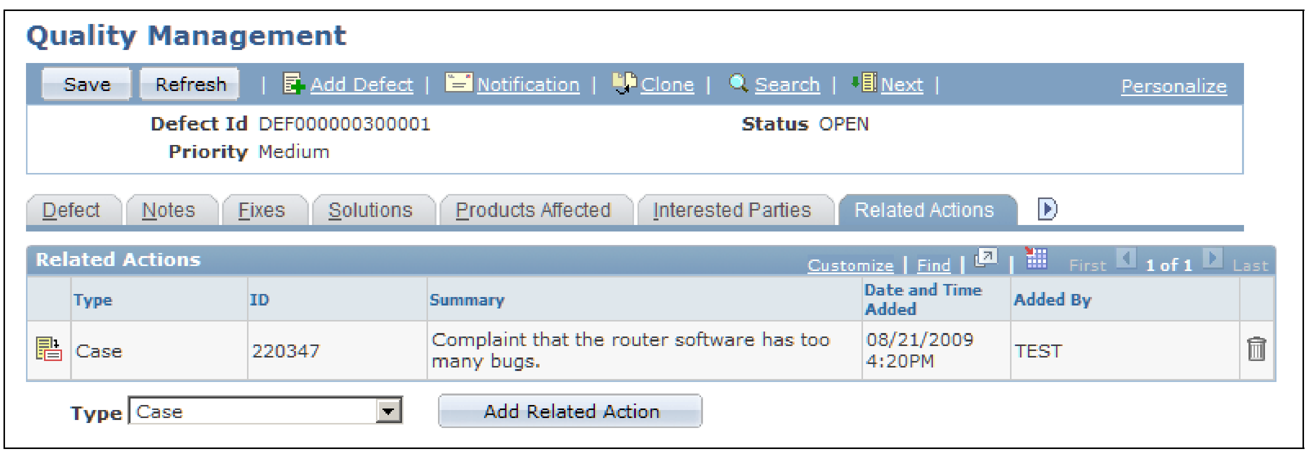


Quality Management - Interested Parties page

Interested parties want to be notified regarding the defect resolution progress, but are not designated as responsible parties. Interested parties can be either employees or non-employees—for example, customers. As with responsible parties, information pertaining to interested parties controls role-related workflow.

Linking Related Cases and Change Requests

Access the Quality Management - Related Actions page (Quality Management, Add Defect, Related Actions).



Quality Management - Related Actions page

Linking a defect to related cases enables call center agents to track a defect throughout the resolution process and to track cases that can be resolved by the same fix. This also enables quality assurance analysts to gain additional information about a case.

Type	Displays the type of related action.
ID	Displays the ID of the related action.
Summary	Displays the details of the action.

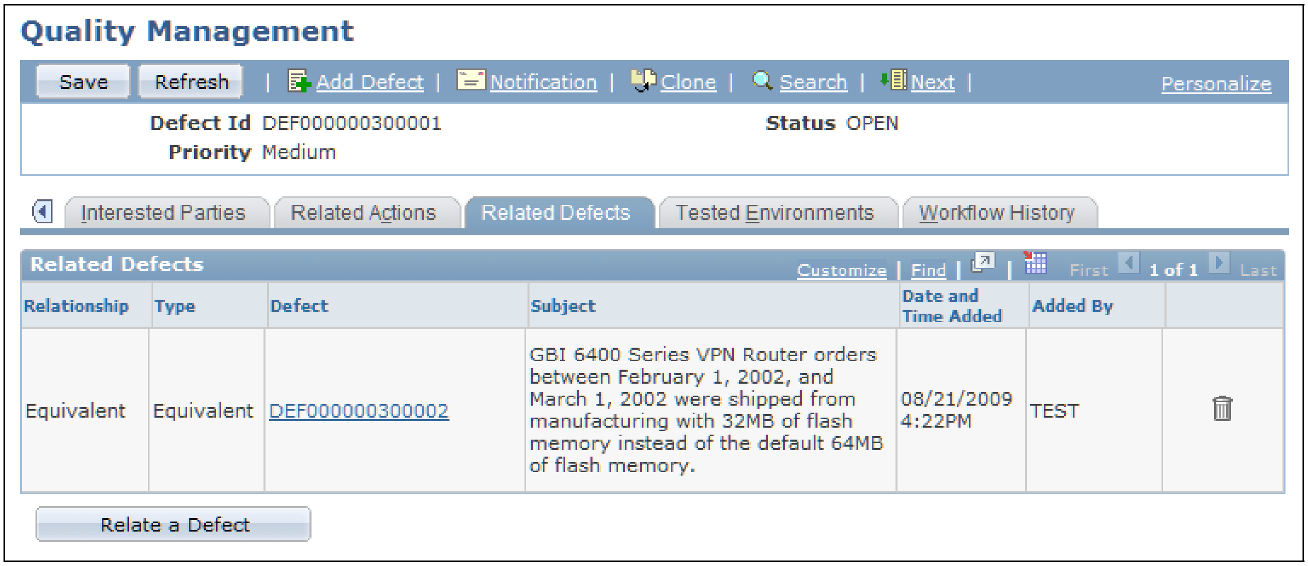
Date and Time Added Displays the date and time when the action and the defect were linked.

Added By Displays the name of the person who linked the action to the defect.

Type Select the type of action to relate. Values include *Case*,*Change Request*, and *Create Change Request.* Selecting *Create Change Request* and clicking the Add Related Action button takes you to the Change Request page.

Viewing Related Defects

Access the Quality Management - Related Defects page (Quality Management, Add Defect, Related Defects).



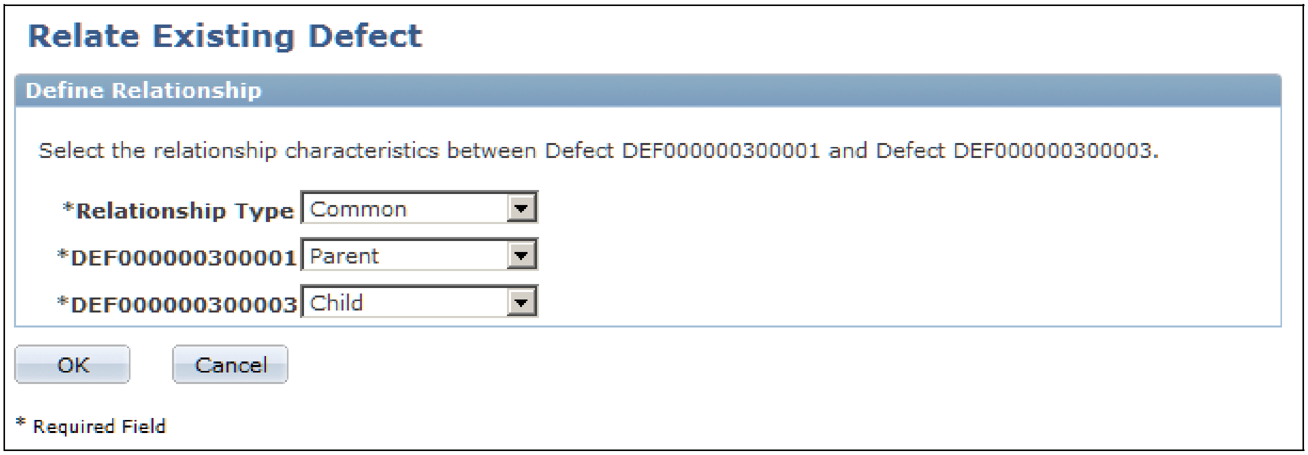
Quality Management - Related Defects page

Use the Quality Management - Related Defects page to view other defects that have been linked to the subject defect. Also, link new defects by clicking the Relate a Defect button.

Relate a Defect Click to access the Relate Existing Defect page and link an existing defect record to the new defect.

Linking Related Defects

Access the Relate Existing Defect page (Quality Management, Add Defect, Related Defects, click the Relate Existing Defect button).



Relate Existing Defect page

Linking related defects shows how a defect affects or is affected by other defects. For example, the hard drives on the new computer model that you are building can't be accessed. The floppy drives on the new model can't be accessed either. As the engineers study the problems, they find that the controller module on the motherboard is designed incorrectly and is responsible for the drive problems. The engineers enter a third defect record and link the two drive defect records as children to the motherboard defect.

Relationship Type

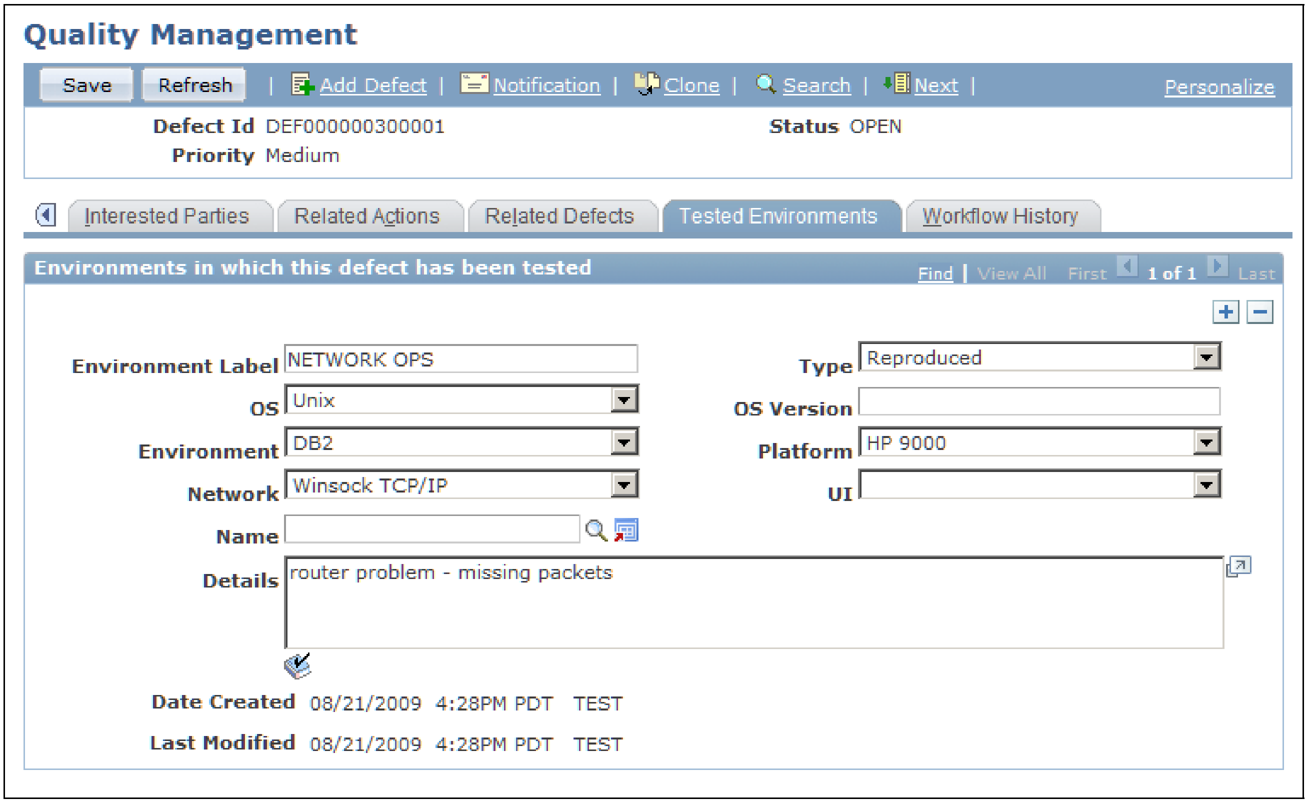
Select the appropriate relationship type to describe the relationship between the defects. You define relationship types in setup. PeopleSoft provides sample values. You can change them or add new values to fit your needs. Also, select the labels that describe the role of each defect in the relationship.

For example, use a relationship type of *Common* to indicate that a defect in one component causes a defect in another component. In this example, the defect in the first component that causes the problem in the second component is the *Parent,* while the second defect is the *Child.* If problems in two or more components are caused by the same defect but there is not a parent and child relationship, the relationship type is *Equivalent* and all linked defects are *Equal.*

Note. All relationship-type labels that are established under a particular setID appear. However, you can select and save labels appropriate to the specified relationship type only.

Identifying Tested Environments

Access the Quality Management - Tested Environments page (Quality Management, Add Defect, Tested Environments).



Quality Management - Tested Environments page

For software defects, it is important to know which environments the defects occurred in. Enter details about as many environment combinations as needed.

Environment Label Enter a name to identify the tested database management system environment.

Type Select an environment type, which relates to reproduction status. Values are: *Not Reproduced*, *Partially Reproduced*, and *Reproduced.*

OS (operating system) and **OS Version** (operating system version) Select or enter the operating system and version of the test environment.

Environment Select the database management system environment in which the test component resides.

Platform Select the computer processor type.

Network Select the type of network on which users utilize the product.

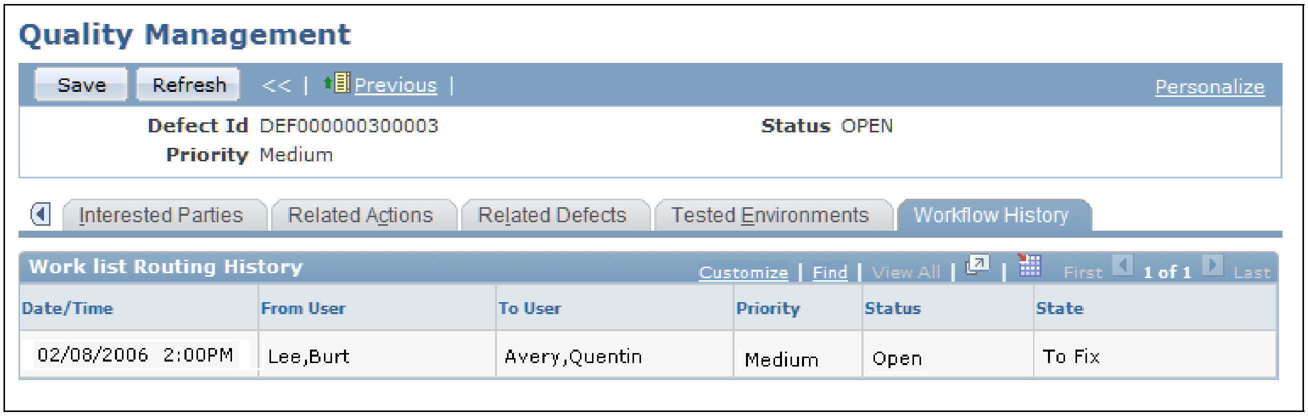
UI(user interface) Select the type of user interface through which users access the component.

Name Select the person who conducted the testing in the stated environment.

Description Describe the testing environment or the tests that were conducted.

Viewing Workflow History

Access the Quality Management - Workflow History page (Quality Management, Add Defect, Workflow History).



Quality Management - Workflow History page

The Worklist Routing History grid displays a record of all workflow related to defect record status changes.

Date/Time Displays the date and time when a worklist notification was saved.

From User and **To User** Displays the users who triggered and received the worklist notification.

Priority, Status, and **State** Displays the priority code, status, and status state of the defect when the worklist notification was saved.

Refresh Grid Click to reflect recent changes to workflow history.

Recording Fixes and Linking Them to Defects

This section discusses how to:

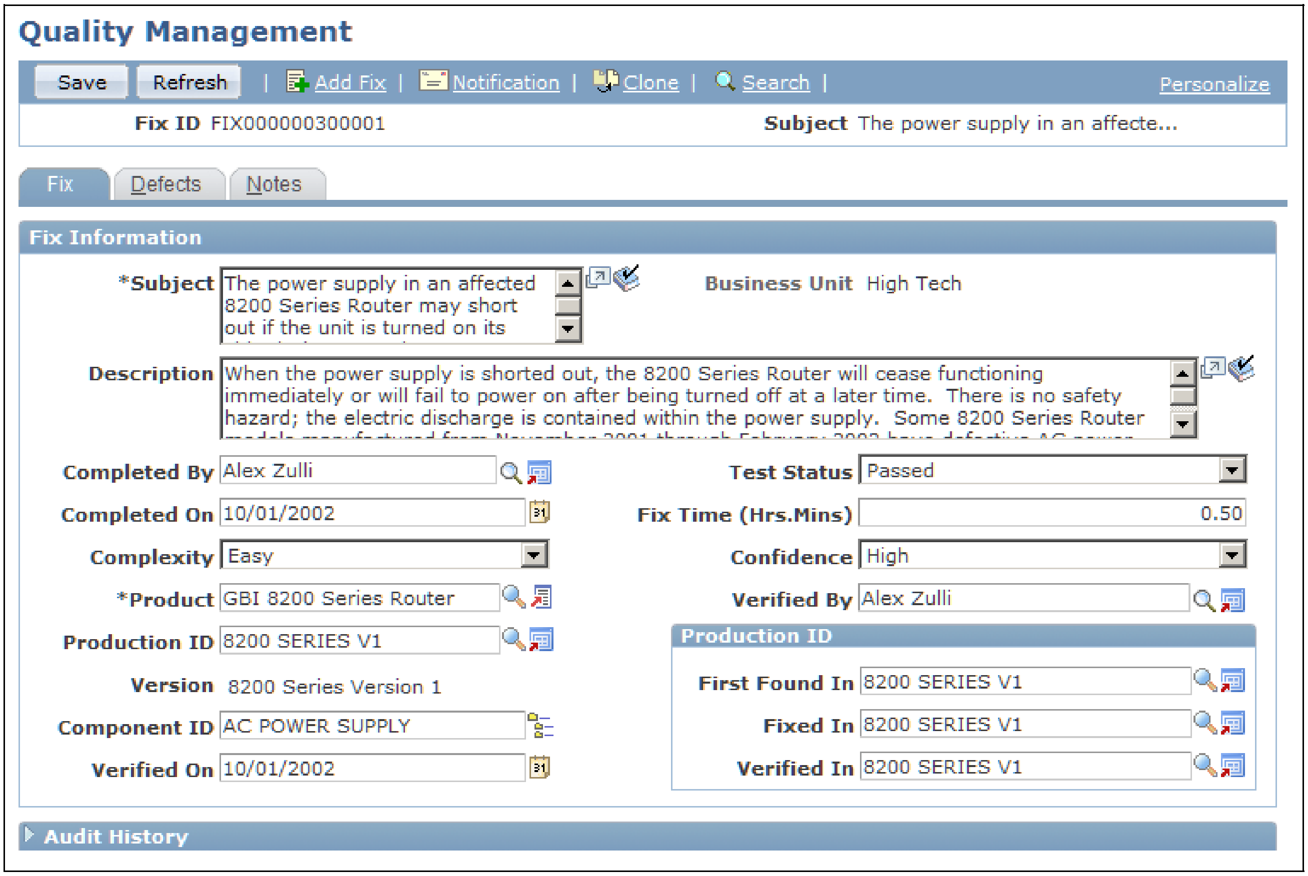
- Enter and update fix information.
- Link defects to fixes.
- Add notes and attachments to a fix.

Pages Used to Record Fixes and Link Them to Defects

Page Name	*Definition Name*	*Navigation*	*Usage*
Quality Management - Fix	RQ_FIX_MAIN	Quality Management, Add Fix, Fix Quality Management, Search Fixes, Fix	Enter and update detailed information about a fix.
Quality Management - Defects	RQ_FIX_DEFECT_LNKS	Quality Management, Add Fix, Defects Quality Management, Search Fixes, Defects	Link defects with fixes. You can link multiple defects to a single fix.
Quality Management - Notes	RQ_FIX_NOTE	Quality Management, Add Fix, Notes Quality Management, Search Fixes, Notes	Add notes and attachments to a fix, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

Entering and Updating Fix Information

Access the Quality Management - Fix page (Quality Management, Add Fix, Fix).



Quality Management - Fix page

Subject — Enter a brief description of the fix.

Completed By — Select the person who completed the fix.

Test Status — Select the testing status of the fix. Values are: *Failed*, *In Progress*, *Partially Passed*, *Passed*, and *Pending.*

Fix Time (Hrs. Mins) (fix time [hours and minutes]) — Enter the approximate time required to complete the fix.

Complexity — Select the level of fix complexity. Values are: *Easy*, *Medium*, *Trivial*, and *Very Complex.*

Confidence — Select the level of confidence in the fix. Values are: *High*, *Low*, and *Medium.*

Product — Select the product to which the fix applies.

Verified By — Select the name of the person who verified that the fix was successful.

Production ID — Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.

Version Once you select a production ID, the system automatically displays the version label.

Component ID Select the component for which the fix applies.

Verified On Select the date of the verification.

First Found In Select the product version in which the defect was first reported.

Fixed In Select the product version in which the fix was first successfully applied.

Verified In Select the product version in which the fix was first successfully tested.

Note. Several of the fields on this page enable you to distinguish between product versions. For example, a flaw in a piece of software code might be introduced into a program in one version (the Production ID field) but not discovered until a later version (the First Found In field). That same flaw might not be fixed until an even later version (the Fixed In field) is issued. By noting the program version in which the problem was introduced, you know to provide the fix to customers who are still using earlier versions.

Linking Defects to Fixes

Access the Quality Management - Defects page (Quality Management, Add Fix, Defects).

Quality Management - Defects page

As fixes are implemented, use the Defects page to link the fix to one or more defects. This provides an immediate link to all reported defects resolved in full or in part by the fix. Alternately, you can link the fix to the defect using the Fixes page in the Defects component.

Searching for defects uses the Verity search engine. To use this feature, you first need to build search collection *CRM_RB_DEFECTFIX*.

Subject Displays the subject of the selected defect.

Add a Link to Defect Click to add a new row to the Defects Linked To This Fix grid.

Adding Notes and Attachments to a Fix

Access the Quality Management - Notes (Fix) page (Quality Management, Add Fix, Notes).

The process of adding notes and attachments is similar across all PeopleSoft applications. For instructions on adding notes and attachments, refer to this PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Working with Notes and Attachments."

Part 4

Self-Service Application

Chapter 20

Configuring Self-Service Applications

This chapter provides an overview of PeopleSoft call center's self-service application configuration and discusses how to:

- Configure the Contact Me Regarding This Problem notifications.
- Associate solutions with reasons for closing cases.
- Update search descriptions.
- Configure the troubleshooting guide solution library.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15

Understanding PeopleSoft Call Center's Self-Service Application Configuration

This section discusses:

- Self-service application configuration.
- Contact Me notifications.
- Live chat.
- Association of solutions with case closure reasons.
- Search descriptions for predefined searches.
- Troubleshooting guide and FAQ configuration.

Self-Service Application Configuration

Central to the addition of enhanced self-service configurability options are display templates. When associated with the Case component, display templates control the appearance and behavior of self-service components and their pages. Implementers can show or hide pages, sections and fields, as well as adjust field labels.

Note. If you create a new display template for self-service transactions, you must define the new template for all the self-service components.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Basic Prompt Tables for Cases, page 56.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15.

RC_SUPPORT Display Template

The RC_SUPPORT, CRM_COM, CRM_ENG, CRM_FIN, CRM_INS and CRM_GOV display template controls these PeopleSoft Support self-service application components:

- RC_CASE_SW_SS (Support - Manage Case)
- RC_CASE_SW_SS_RPT (Support - Create Case)
- RC_CASE_SW_SS_SRCH (Support - Search Cases)
- RC_SOLNSRCH_SW_SS (Support - Search Solutions)
- RC_SS_SW (Self Service Support Desk)

RC_HELPDESK, CRM_HHD, and CRM_HE Display Templates

The RC_HELPDESK (PeopleSoft HelpDesk), CRM_HHD (PeopleSoft HelpDesk for Human Resources), and CRM_HE (PeopleSoft Service Center for Higher Education) display templates controls the following HelpDesk self-service application components:

- RC_CASE_HD_SS (HelpDesk - Manage Case)
- RC_CASE_HD_SS_RPT (HelpDesk - Create Case)
- RC_CASE_HD_SS_SRCH (HelpDesk - Search Cases)
- RC_SOLNSRCH_HD_SS (HelpDesk - Search Solutions)
- RC_SS_HD (Self Service HelpDesk Desk)

Contact Me Notifications

If you include the Contact Me Regarding This Problem button on the self-service application pages, ensure that clicking this button sends the appropriate notifications. PeopleSoft delivers AAF objects (trigger points, action types, and terms) to support this process.

The delivered AAF objects send notifications to the assignee (agent, provider group, or call center manager). Separate email and worklist notifications enable the system to send notifications using the recipient's preferred notification method.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Live Chat

All self-service pages are enabled for chat. This immediate access to a live agent, if needed, encourages self-service adoption and enables organizations to eliminate potential customer frustration or abandonment by delivering real-time service.

See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Setting Up Chat."

See *PeopleSoft Enterprise CRM 9.1 Multichannel Applications PeopleBook*, "Working with Chat in PeopleSoft Enterprise CRM."

Association of Solutions with Case Closure Reasons

Depending on system configuration, closed cases are generally associated with a successful solution. You define whether a self-service application user can close or reopen self-service application cases on the Business Unit - Options page.

When a self-service application user clicks the Close Case button to close a case, the Close Case page prompts the user for a reason. The system derives the successful solution from the reason that the self-service application user enters. Reason codes are tied to solutions which are then used to resolve the case.

There are two types of case closure reasons:

- A predefined reason (as established on the Reason Code page).
- A free-form text reason.

Note. Use the Reason and Solution Link page to associate solutions with each of the predefined reasons. If the user selects a reason that does not have an associated solution, the system creates and uses a new solution type: *Canned.* The reason code description becomes the solution summary. If the user enters a free-form text reason, the system creates and uses a new solution type: *Adhoc.* The text that the user enters becomes the solution summary. Users can enter multiple solutions to solve cases.

See Also

Chapter 11, "Processing Cases," page 303

Chapter 20, "Configuring Self-Service Applications," Associating Solutions with Reasons for Closing Cases, page 480

Chapter 3, "Setting Up Call Center Prompt Tables," page 51

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Setting Up Solution Management"

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Managing Solutions"

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15

Search Descriptions for Predefined Searches

Self-service application users have access to predefined searches that locate cases that are associated with the user.

Case Accessibility

Self-service application cases can be accessed by:

- Company representatives (contacts).

  In PeopleSoft Support cases are created mainly for companies. This is anyone who acts as a contact for the company, regardless of whether that person is associated with the case in question. You can also allow the creation of cases for consumers. When cases are created for consumers, the contact can be a consumer or another person.

  Note that in PeopleSoft Service Center for Higher Education, cases can be created by constituents (who have the role of individual consumers).

- Employees.

  In PeopleSoft HelpDesk and PeopleSoft HelpDesk for Human Resources cases are typically created by employees. In PeopleSoft HelpDesk there can be an alternate contact. Employees acting on their own behalf are *not* considered alternate contacts.

  In PeopleSoft Service Center for Higher Education, cases can be created by employees: this is typically done by staff or faculty who need to create a case.

- Managers

  In PeopleSoft HelpDesk for Human Resources managers can report cases on behalf of the people reporting directly to them. This functionality requires an interface to a human resource management system. In PeopleSoft HelpDesk managers can report a case on behalf of another worker, provided the worker has been properly entered into the PeopleSoft CRM system.

A person who is a contact for more than one customer (for example, a consultant who works with several of your customers) uses the Customer Selection pagelet in the PeopleSoft Customer Portal to indicate which company's information to access.

Case Searching

Self-service application users can search for existing cases in two ways:

- Basic search.

  The user selects a search from a list of predefined searches.

- Advanced search.

  The user can enter search words, including field-specific search criteria.

There are two categories of predefined searches (searches in both categories search across business units).

- *All cases:* This search locates all of the cases that the user can access:
  - In PeopleSoft Support, company contacts can view all of the company's cases, including cases for which they are not the contact.
  - In PeopleSoft Support, consumers can view all of the cases that are reported on their behalf (regardless of the contact) and all of the cases for which they are contacts (regardless of the customer).
  - In PeopleSoft HelpDesk, employees can view all of the cases that were reported on their behalf (regardless of the contact) and all of the cases for which they are alternate contacts, even if the case was reported for someone else. The delivered name for this search is *all my cases.*
  - In PeopleSoft Service Center for Higher Education, consumers, company contacts and employees will be able to view their cases and any cases for which they are a contact.
- *Cases for which I am the contact:* This search locates cases where the self-service application user is the contact, regardless of the person or company for whom the case was created.
  - In PeopleSoft Support, a person representing a company can view cases for the company that is being represented. They do, however, have to be the contact for the case to be able to view the case.
  - In PeopleSoft Support, consumers can view cases for which they are the contact. Unless another person is identified as the case contact, consumers are considered their own contacts.
  - In PeopleSoft HelpDesk, employees can view cases for which they are the alternate contact. This search does not retrieve cases for which the user is the employee and there is no alternate contact, even though the absence of an alternate employee implies that the employee is the case contact.

These predefined searches are based on the *All cases* and *Cases for which I am the contact.*search types:

- All cases that I am contact for.
- All my cases.
- All my open cases.
- Cases that I am contact for, last 30 days.
- Cases that I am contact for, last 7 days.
- Cases that I reported for others.
- My cases reported in the last 30 days.

- My cases reported in the last 7 days.
- Open cases that I am contact for.
- Open cases that I reported for others.

When you configure descriptions for the searches, you can set up different descriptions for each delivered role type: *contact, consumer, broker,* and *employee.*

Note. If you add additional role types that apply to self-service application users, you must set up corresponding predefined searches. The system does not do this for you.

See Also

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Control Values for Business Objects," Defining Role Types and Role Categories

Troubleshooting Guide and FAQ Configuration

PeopleSoft Support and HelpDesk self-service application users have direct access to solutions and troubleshooting guides.

Note. Troubleshooting guides and FAQs are used in PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources.

Troubleshooting Guides

To make a troubleshooting guide script available to self-service application users, associate it with a solution library. You can associate solution libraries with one script only, so you must create a library for each script. When self-service application users select a script, they see the library name, not the script name.

Frequently Asked Questions (FAQs)

The Frequently Asked Questions self-service page gives PeopleSoft Support self-service customers access to solutions whose corresponding library has the External FAQ check box selected.

See Also

Chapter 21, "Working with Self-Service Application Transactions," Accessing FAQs, page 526

PeopleSoft Enterprise CRM 9.1 Business Object Management PeopleBook, "Defining Control Values for Business Objects," Defining Role Types and Role Categories

Chapter 21, "Working with Self-Service Application Transactions," Selecting and Running Troubleshooting Guides, page 528

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Setting Up Solution Management"

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Managing Solutions"

Configuring Contact Me Regarding This Problem Notifications

This section discusses how to configure notifications that are triggered after users click the Contact Me Regarding This Problem button on self-service application pages.

Note. The Contact Me Regarding This Problem button is specific to call center self-service application pages; it is different from the Contact Us page that customers use to submit general-purpose questions and feedback to your organization.

To configure notifications for the Contact Me Regarding This Problem button:

1. Create a new email template (if you do not want to use the delivered email template for your email notifications).

2. Set up an AAF policy to configure the use of the Contact Me Regarding This Problem button.

   Use these AAF delivered data elements:

Data Element	***Name***
Trigger Point	After a New Self-Service HelpDesk Case is Saved After a New Self-Service Support Case is Saved
Policy Name	Employee Has Requested Contact - Agent Assigned Employee Has Requested Contact - Provider Group Assigned Employee Has Requested Contact - No Provider Group or Agent Assigned Self Service Case Created - Assigned to Agent Self Service Case Created - Assigned To Provider Group **Note.** These are the policies that PeopleSoft delivers. You can create new policies as you need them.
Action Type	Notifications & Workflow
Action Name	Worklist Notification to Assigned To Send Worklist Notification

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Customer Self-Service Transactions," Sending Contact Us Messages

Associating Solutions with Reasons for Closing Cases

This section discusses how to associate solutions with reasons for closing cases.

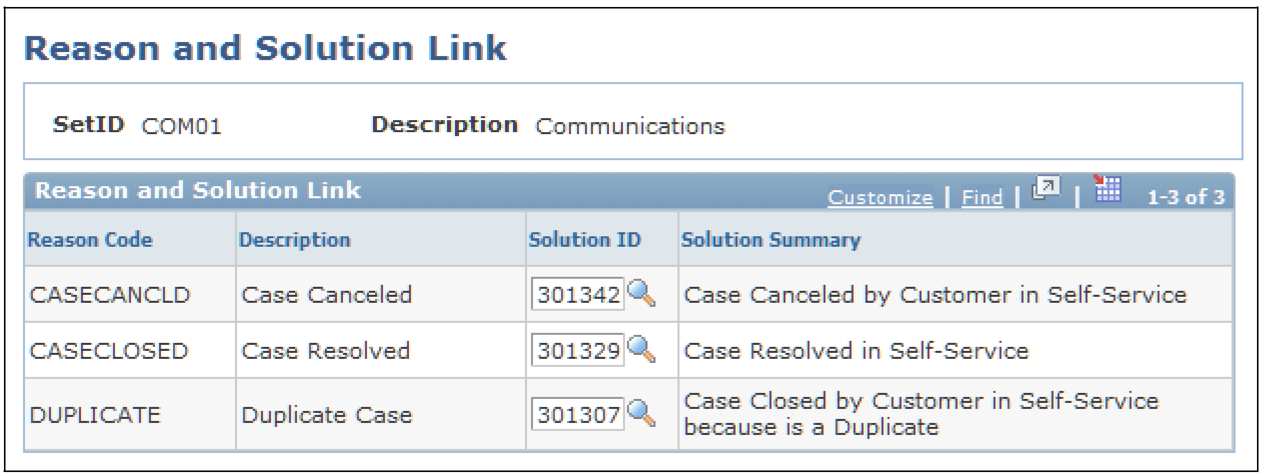
Page Used to Associate Solutions with Reasons for Closing Cases

Page Name	***Definition Name***	***Navigation***	***Usage***
Reason and Solution Link	RC_REASON_SOLN	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Reason and Solution Link	Identify the solutions that users can select from to close cases through self-service applications.

Identifying Solutions

To identify solutions, use the Reason and Solution Link (RC_REASON_SOLN) component.

Access the Reason and Solution Link page (Set Up CRM, Product Related, Call Center, Self-Service Configuration, Reason and Solution Link).



Reason and Solution Link page

Reason Code Displays all the reasons of the type *Reason Closed* that you have set up for this setID. These are the reasons that a self-service application user can select from when closing a case.

Solution ID

Select the solution that represents the reason a user may close a case. When a self-service application user closes a case and selects a reason, the associated solution is added to the case as a resolution with this status: *Successful Resolution.*

If a reason does not have an associated solution, then the first time that a self-service application user closes a case with that reason, the system creates a *Canned* solution and associates it with that reason. The next time that reason is used, the solution that was previously created is used.

Updating Search Descriptions

To update search descriptions, use the Predefined Search Attributes (RG_DEFINED_SRCH) component.

This section discusses how to update predefined search descriptions.

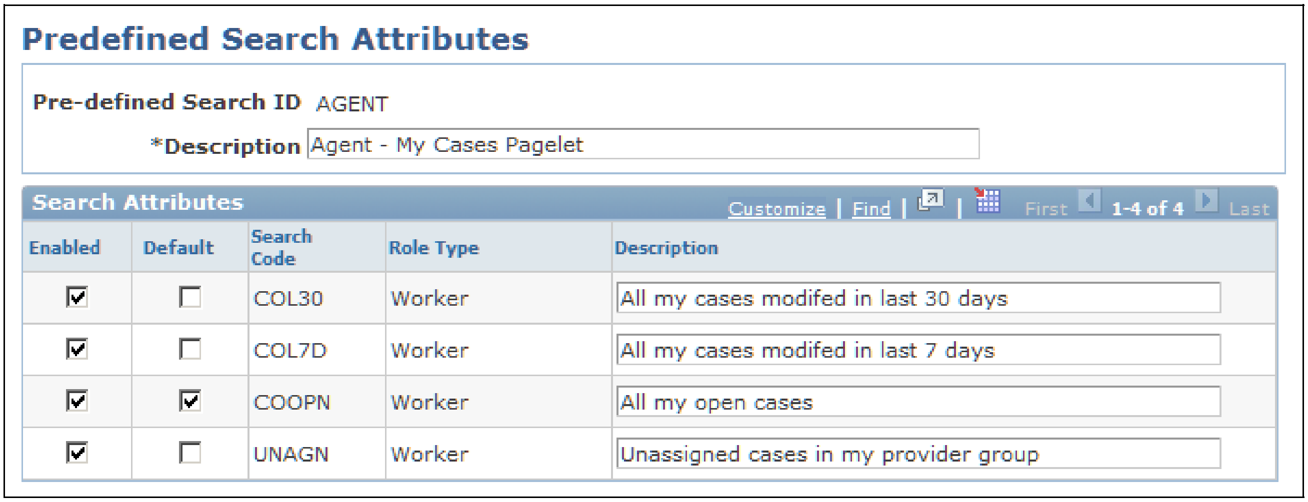
Page Used to Update Search Descriptions

Page Name	***Definition Name***	***Navigation***	***Usage***
Predefined Search Attributes	RC_DEFINED_SRCH	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Predefined Search Attributes	Update predefined search descriptions.

Updating Predefined Search Descriptions

To update predefined search descriptions, use the Predefined Search Attributes (RC_DEFINED_SRCH) component.

Access the Predefined Search Attributes page (Set Up CRM, Product Related, Call Center, Self-Service Configuration, Predefined Search Attributes).



Predefined Search Attributes page

For each search code and customer role type combination, review the search description and modify it as needed. You can also enable a search code or disable it by either clearing or selecting the associated check box. Select one of the search codes as the default, if desired.

Configuring Troubleshooting Guide

To configure troubleshooting guides, use the Troubleshooting Guide (RBT_TGUIDE_SETUP) and Solution Library Setup (RC_SOLN_LIB_SETUP) components.

This section discusses how to:

- Configure a troubleshooting guide solution library.
- Configure an FAQ solution library.

Pages Used to Configure Troubleshooting Guides

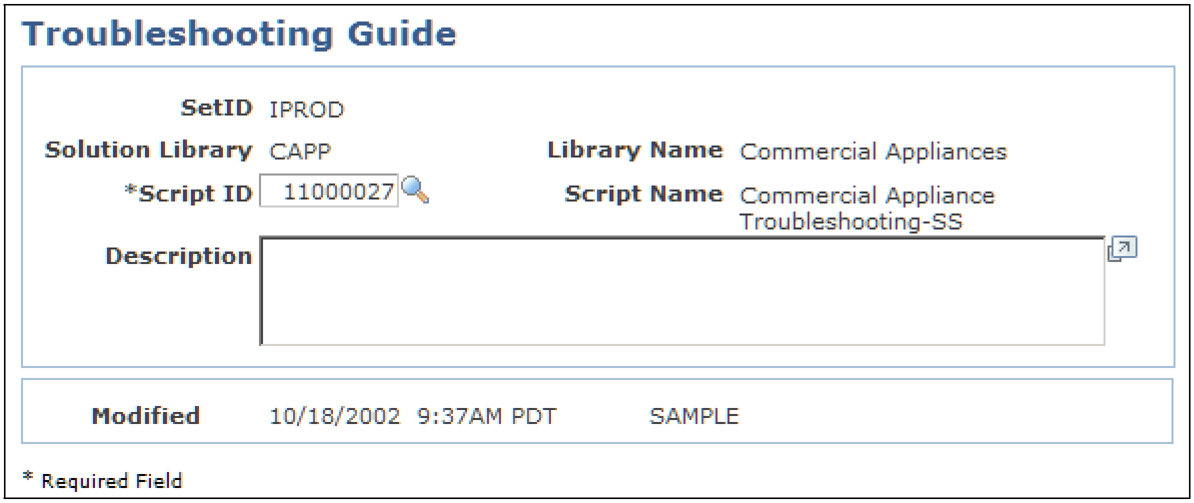
Page Name	*Definition Name*	*Navigation*	*Usage*
Troubleshooting Guide	RBT_TGUIDE_SETUP	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Troubleshooting Guide Setup, Troubleshooting Guide	Identify troubleshooting guide scripts that customers can access through self-service applications.
Libraries	RC_SOLN_LIBRARY	Solutions, Search Solutions, Libraries	Create solution libraries.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Setting Up Solution Management," Solution Libraries

Configuring a Troubleshooting Guide Solution Library

Access the Troubleshooting Guide page (Set Up CRM, Product Related, Call Center, Self-Service Configuration, Troubleshooting Guide Setup, Troubleshooting Guide).



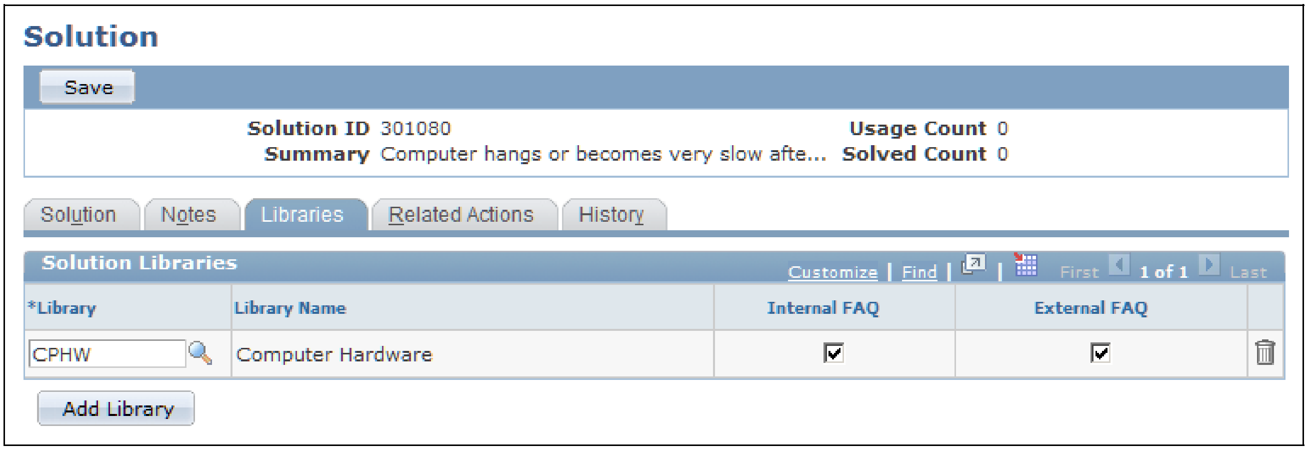
Troubleshooting Guide page

Script ID Select the script to run when the self-service application user selects the solution library.

Because each library is associated with a single script, you must create additional libraries for each script that you want to make available to self-service application users on the Customer Care - Troubleshooting Guide page.

Configure FAQ solutions

Access the Libraries page (Solutions, Search Solutions, Libraries).



Solution Library page

Select the External FAQ check box to make the solution available to self-service users as a Frequently Asked Question.

Solution libraries are set up in a similar manner across many PeopleSoft CRM applications. For instructions on using this page, refer to this PeopleBook:

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Setting Up Solution Management," Defining Solution Libraries

Chapter 21

Working with Self-Service Application Transactions

This chapter provides an overview of self-service application transactions and discusses how to:

- Access self-service transactions.
- Add cases.
- Manage existing self-service application cases.
- Search for solutions.
- Access frequently asked questions (FAQs).
- Select and run troubleshooting guides.

Understanding Self-Service Transactions

PeopleSoft CRM call center applications enable you to deploy self-service transactions that callers can use to enter and view their own cases. These transactions provide limited access to case information and employ a simple interface that is suited to the casual, untrained user.

This section discusses:

- Self-service transactions.
- Configurable functionality.
- Self-service data access.
- Case visibility.
- Solution tracking in self-service.
- Confirmation pages.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Customer Self-Service Transactions"

Self-Service Transactions

The following transactions are available to PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources self-service users:

- Search for solutions outside the context of a case.
- Create a new case (add case).
- Manage cases.

  Search for, review, and update existing cases.
- Use FAQs.

  Access solutions that belong to the solution library with a specific FAQ configuration.
- Use troubleshooting guides.

  Access and run troubleshooting guide scripts that have been associated with solution libraries.

Note. For information on using employee self service to add and manage change requests, refer to the chapter on Using Change Management in this PeopleBook.

See Also

Chapter 18, "Using Change Management," Managing Basic Change Request Information, page 432

Configurable Functionality

Within the transactions that are used to create and manage cases, certain functionality depends on the system configuration.

Business Unit Configuration

The availability of the following functionality depends on the settings on the Business Unit - Options page:

- Close a case.

  The Close Case button is available for cases that have not been resolved and have no corresponding resolution with the status *Successful Resolution.* The button's availability depends not on the case status, but on the resolution status.

  When a self-service user clicks this button and provides a reason for closing the case, the system adds a successful resolution to the case and updates the status based on the closed case status that you select on the Case Defaults page. (If you do not enter a closed case status or if you enter a status with a type other than *Closed,* then the case is not closed. It is resolved, however.)

- Reopen a case.

  The Reopen Case button is available for cases that have been resolved—that is, there is a resolution with the status *Successful Resolution.* The button's availability depends not on the case status, but on the resolution status.

  When a self-service user clicks the Reopen Case button and provides a reason for reopening the case, the system changes the status of the successful resolution to *Resolution Failed* and updates the status based on the reopened case status that you select on the Case Defaults page. (If you do not enter a reopened case status, the status does not change.)

  If your organization has not set a reopened case status, the status doesn't change. This could result in cases having a closed status without having a successful resolution—a condition that the system normally does not allow.

  Users can reopen cases only during the grace period that is established by your organization. The grace period lasts for a specified number of days after a user has resolved the case.

Active Analytics Framework (AAF) Notifications

The AAF decision engine handles notifications related to activity that is in the self-service pages. PeopleSoft delivers AAF action types that:

- Send a notification when a new case is submitted.
- Send a notification when a user clicks the Contact Me Regarding This Case button.

The system sends both notifications to the agent, call center manager, or provider group who is assigned to the new case.

Note. All AAF policies are delivered inactive. Users must activate the AAF objects that they wish to use.

Self-Service Workflow

PeopleSoft has built these action types and workflow actions into its self-service applications for PeopleSoft HelpDesk, Support, and Service Center for Higher Education:

- When a self-service user saves any change to the case, the system sends an email notification to the person to whom a case is assigned.
- When a self-service user creates a new case, the system sends a worklist notification to the default self-service provider group that is associated with the business unit.
- When a user clicks the Contact Me Regarding This Problem button for a case that is assigned to an agent:
  - The system sends an email to the assigned agent of the case if their notification preference is email or both.
  - The system sends the case to the assigned case agent's list if their notification preference is worklist or both.
- When a user clicks the Contact Me Regarding This Problem button for a case that is assigned to a provider group (but not to an agent), the system sends a worklist entry to the provider group members.

- When a user clicks the Contact Me Regarding This Problem button for a case that is unassigned, the system sends a worklist entry to members of the Contact Me provider group (established on the Case Defaults page).

Field Value Configuration

When you set up prompt tables for certain case fields, you can enter self-service versions of the field values.

See Also

Chapter 20, "Configuring Self-Service Applications," page 473

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15

Chapter 3, "Setting Up Call Center Prompt Tables," page 51

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Self-Service Data Access

The fields and data that appear in the self-service transactions vary depending on the configuration and on the data itself.

Field Visibility

Implementers can control the visibility of fields and the appearance of field labels by modifying the display template.

See Chapter 20, "Configuring Self-Service Applications," page 473.

Row-Level Visibility

Individual case notes and case history items have a visibility attribute that controls self-service access to the data. The Case Notes and Case History grids on the Manage Case page show only rows of data with *All* visibility. Notes, attachments, and history items with internal visibility do not appear.

Access to solutions is more complex, depending on two factors:

- Solution visibility

  When accessing solutions using Solution Advisor or the Frequently Asked Questions page, only solutions with *All* visibility are visible.

- Resolution status

  When viewing a case, self-service users can see associated solutions that have a status other than *Withdrawn.* Solutions that are associated with a case appear regardless of the solution's visibility setting.

- Case visibility

  When searching cases in Case Search, only the cases with *All* visibility are visible.

Values That Are Available for Selection

When creating a case, self-service users have access to all fields that are available for entry. For some prompt fields (case type, priority, severity, category, specialty type, and detail), self-service users might not have access to all of the values that are valid for agents. This restriction is based on how the value was defined on its setup page. Only values that are tagged for self-service use are available. Furthermore, the field labels for self-service users may differ from those seen by agents (depending on prompt table setup).

See Also

Chapter 20, "Configuring Self-Service Applications," page 473

Chapter 3, "Setting Up Call Center Prompt Tables," page 51

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Case Visibility

To prevent employees from viewing sensitive case information (for example, grievances) through the HelpDesk self-service applications, PeopleSoft has added a value called *Internal, exclude Case Contact* to the Visibility drop-down menu list on the agent-facing Case page. When an agent selects *Internal, exclude Case Contact*, the employee who is the subject of the case is unable to view the case through the HelpDesk self-service application.

The person who reported the case (Reported By) can view it in the self service application if the case is not secured. When a case is secured, the Reported By person will no longer have visibility to the case in the self-service application.

Note. This feature is only applicable to CRM HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education.

See Also

Chapter 10, "Managing Cases," Case Visibility, page 256

Solution Tracking in Self-Service

Users can search for solutions from self-service applications by clicking the Search for Solutions button. The self-service application Solution page has these tabs:

- Keyword Search

  This is similar to how the keyword searches work in agent-facing call center applications. There is a *Basic* and an *Advanced* search. The Advanced Search in self-service applications contain limited options. The more advanced options of searching over particular domains is reserved for agent-facing case solution searches.

- Frequently Used

  This is similar to how the frequently used solutions work in agent-facing call center applications.

See *PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook,* "Setting Up Solution Management."

Searching from Within a Case

If the user is searching from within a case, the possible responses are *YES* and *NO.* When the user selects a response, the system:

- Updates the resolution status if the user originally accessed a solution that was already associated with the case.

  The resolution status refers to the status of the solution in the context of a case. This is different from the solution status, which is independent of any case.

- Associates the solution with the case and sets the initial resolution status.

If you click on a solution to open the Solution Details page, you have the option to select *Yes, No,* or *I'll try it later.*

The resolution status is set as follows:

- Answering *YES* sets the status to *Successful Resolution.*

  If you've established a default case status for resolved cases on the Case Defaults page, then *Yes* also updates the case status.

- Answering *No* sets the status to *Failed Resolution.*

- Answering *I'll try it Later* sets the status to *Waiting on Customer*.

Searching Outside the Context of a Case

If the user is searching outside the context of a case, the possible responses are *YES* and *NO.*

Solution usage outside the context of a case does not affect the solution usage counts. However, the system records the attempt internally in the RC_SOLN_ATMT_SS table. This information is not visible through the PeopleSoft Internet Architecture, but it is available for reporting and analysis.

See Also

Chapter 11, "Processing Cases," page 303

Confirmation Pages

When self-service users perform certain actions, the system provides a confirmation to assure the user that the transaction was successful.

The confirmation pages have different forms depending on the application.

- PeopleSoft Support uses red confirmation text at the top of the page where the user performed the action.
- PeopleSoft HelpDesk and PeopleSoft Service Center for Higher Education use a separate confirmation page, where the user must click a button or link before continuing.

Note. You can control the appearance of configuration pages by modifying display templates.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook,* "Configuring Display Templates," Configuring Display Templates for Components.

The following actions trigger confirmation messages:

User Action	***PeopleSoft HelpDesk Confirmation Page***	***Description***
Submit a new case without searching for solutions (click the Submit button, not the Submit and Search Solutions button).	Submit Confirmation page (RC_CASE_HD_SS_CONF)	Confirms that the user submitted the case. Gives the user the new case number.
Close or reopen a case.	Submit Confirmation page (RC_CASE_HD_SS_SUBT)	Confirms that the case is successfully closed or reopened.
Click the Contact Me Regarding this Problem button.	Submit Confirmation page (RC_CASE_HD_SS_CONF)	Confirms that the user's request to be contacted is sent.
Submit a new note or new contact information.	Save Confirmation page (RC_CASE_HD_SS_SAVE)	Confirms that the transaction is recorded.
Answer *Yes* when asked whether a solution resolved the user's problem (when viewing a solution in the context of a case).	Close Case page (RC_CASE_HD_SS_CLOS)	Confirms that the solution is successful and the case is closed.

Accessing Self-Service Transactions In PeopleSoft CRM and HRMS

This section provides overviews on self-service case search, case creation, and case management as they relate to display template families, and discusses how to access self-service transactions.

Understanding Self-Service Case Search and Display Template Families

The system passes the display template family from the content reference (CREF), which is embedded in links under the left-hand navigation menu. This enables the system to search for cases across the display template family for cases using the self-service search case component (RC_CASE_SW_SS_SRCH or RC_CASE_HD_SS_SRCH).

CREF Name	***Industry***	***Display Template Family***
CR_RC_CASE_SW_SS_SRCH_GBL	Support	RC_SUPPORT
CR_RC_CASE_SW_SS_SRCH_FIN	Financial	CRM_FIN
CR_RC_CASE_SW_SS_SRCH_INS	Insurance	CRM_INS
CR_RC_CASE_SW_SS_SRCH_COM	Communications	CRM_COM
CR_RC_CASE_SW_SS_SRCH_ENE	Energy	CRM_ENG
CR_RC_CASE_SW_SS_SRCH_GOV	Government	CRM_GOV
CR_RC_CASE_HD_SS_SRCH	IT Help Desk	RC_HELPDESK
CR_RC_CASE_HD_SS_SRCH_HHD	HR Help Desk	CRM_HHD
CR_RC_CASE_HD_SS_SRCH_HE	Service Center for Higher Education	CRM_HE

The searching logic uses the display template family instead of the display template ID to filter the cases that are shown in the results grid. Based on the defaulting logic described in previous sections on display template families, the system defaults the display template family, business unit, and display template ID in the self-service search results grid. You cannot, however, define AAF actions for this component. For the Create Case and Manage Case components you can, however, use AAF to render the Case page with a selected display template.

Case Creation and Display Template Families

The system passes the display template family from the content reference (CREF) to create cases for the create case component (RC_CASE_SW_SS_RPT or RC_CASE_HD_SS_RPT).

The system renders the Add Case pages for the different industries based on the defaulting logic described in previous sections, which relies on system defaults for the display template family, business unit and display template ID.

PeopleSoft delivers four AAF trigger points that you can use to render the Add Case page using different display template IDs:

- When a New Self-Service Support Case is presented.
- When a New Self-Service Help Desk Case is presented
- When a New Self-Service Support Case Business Unit is changed.
- When a New Self-Service Help Desk Case Business Unit is changed.

Based on the AAF policies that you create, the system derives the display template ID when the Case Post Build Event executes. This is used to render the Add Case page. With this design, the system does not store the display template ID in the case record. Instead, the system stores the display template family code in the case record.

Case Management and Display Template Families

The system passes the display template Family from the *CRMCRefTransfer* application programming interface (API) to display the Manage Case page (RC_CASE_SW_SS) .

The system renders the Manage Case pages for the different industries based on the defaulting logic described in previous sections, which relies on system defaults for the display template family, business unit and display template ID.

PeopleSoft delivers two AAF trigger points for this component that you can use to render the Manage Case page using different display template IDs:

- When a Support Manage Case is presented.
- When a Help Desk Manage Case is presented.

After the system creates a case, you cannot change the display template family code.

Pages Used to Access Self-Service Transactions

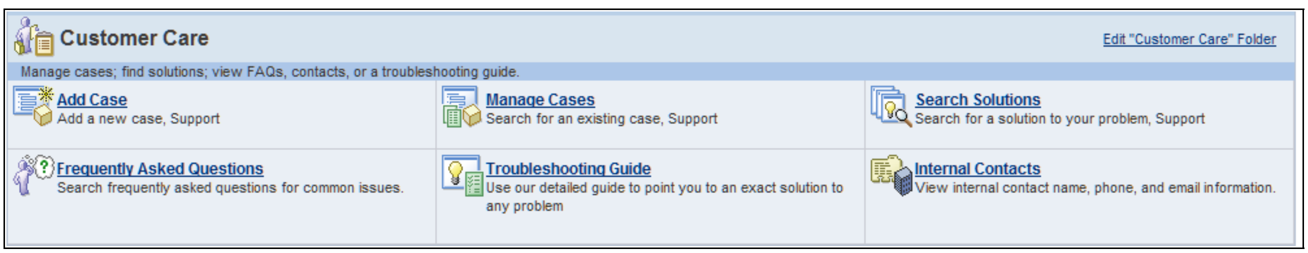
Use these pages to access Self-Service Transactions.

Page Name	***Navigation***	***Usage***
Customer Care	Customer Care (PeopleSoft Support only)	Select a PeopleSoft Support self-service application transaction.
Help Desk	Employee Self Service, Help Desk	Select a PeopleSoft HelpDesk self-service application transaction.
HR Help Desk	Employee Self Service, HR Help Desk	Select a PeopleSoft HR HelpDesk self-service application transaction.
Self Service	Employee Self Service, HR Help Desk, HRMS Employee Self Service	Select an employee self-service application transaction in PeopleSoft HRMS.

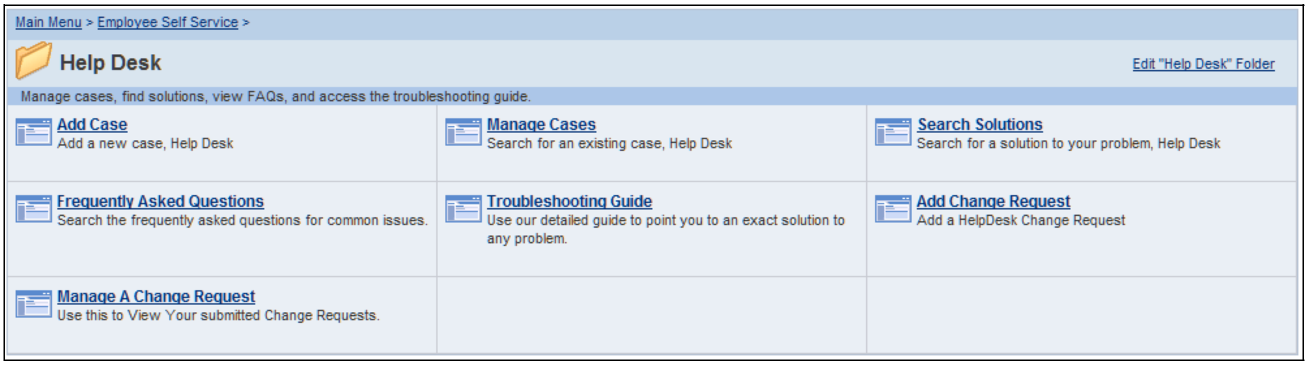
Page Name	Navigation	Usage
Manager Self Service	Employee Self Service, HR Help Desk, HRMS Manager Self Service	Select a manager self-service application transaction in PeopleSoft HRMS.
Service Center	Service Center	Select a PeopleSoft Service Center for Higher Education self-service application transaction.
Student Center	Service Center, Student Center	Select a self-service application transaction in PeopleSoft Campus Solutions.
Faculty Center	Service Center, Faculty Center	Select a self-service application transaction in PeopleSoft Campus Solutions.
Customer Selection	Service Center, Customer Selection	Select a customer to represent in PeopleSoft Service Center for Higher Education self-service application transactions.

Accessing Self-Service Transactions in PeopleSoft CRM

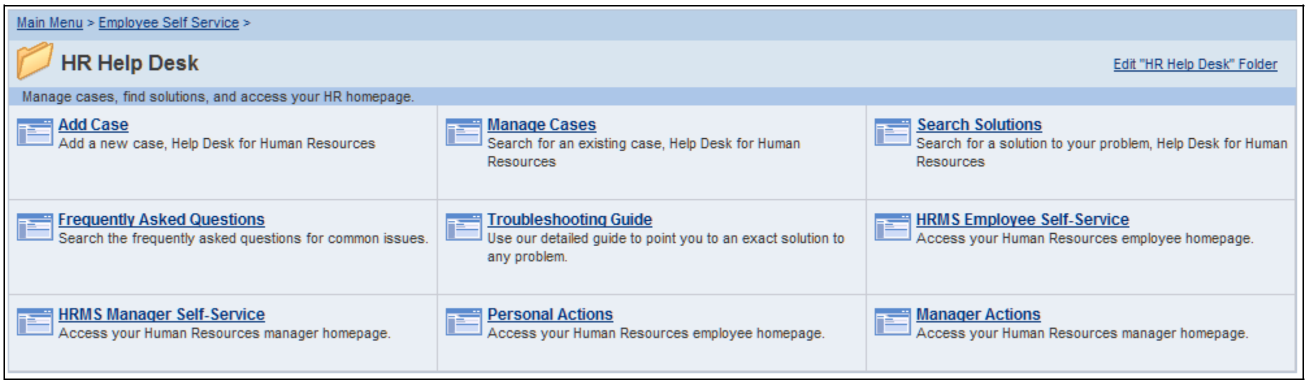
Access the Customer Care, Help Desk, HR Help Desk, or Service Center welcome page.



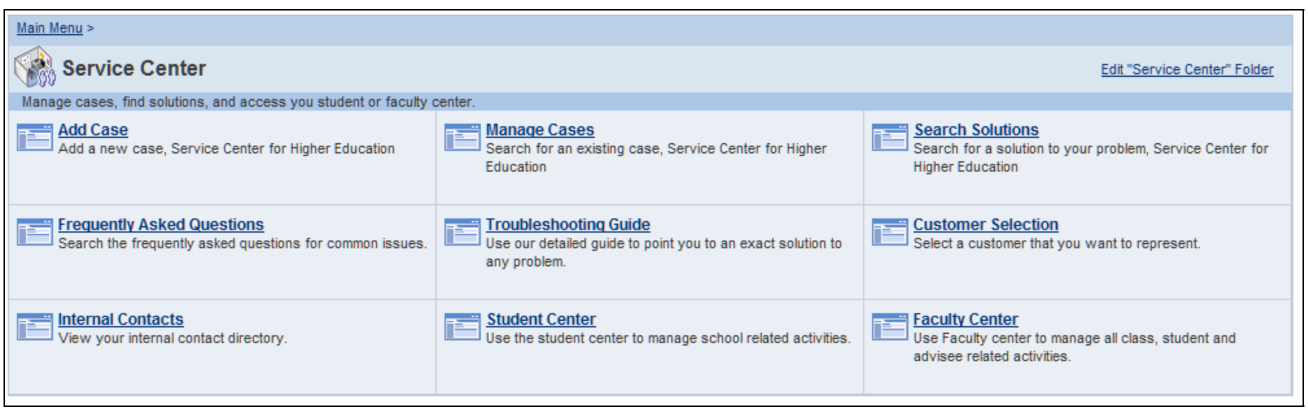
Customer Care welcome page



Help Desk welcome page

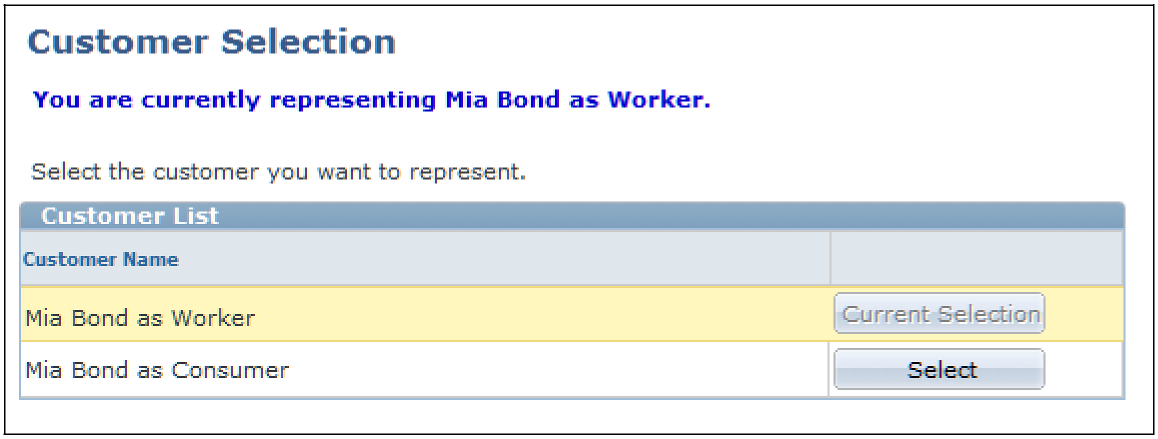


HR Help Desk welcome page



Service Center welcome page

Click the links on these pages to access self-service transactions in PeopleSoft CRM.



Customer Selection page

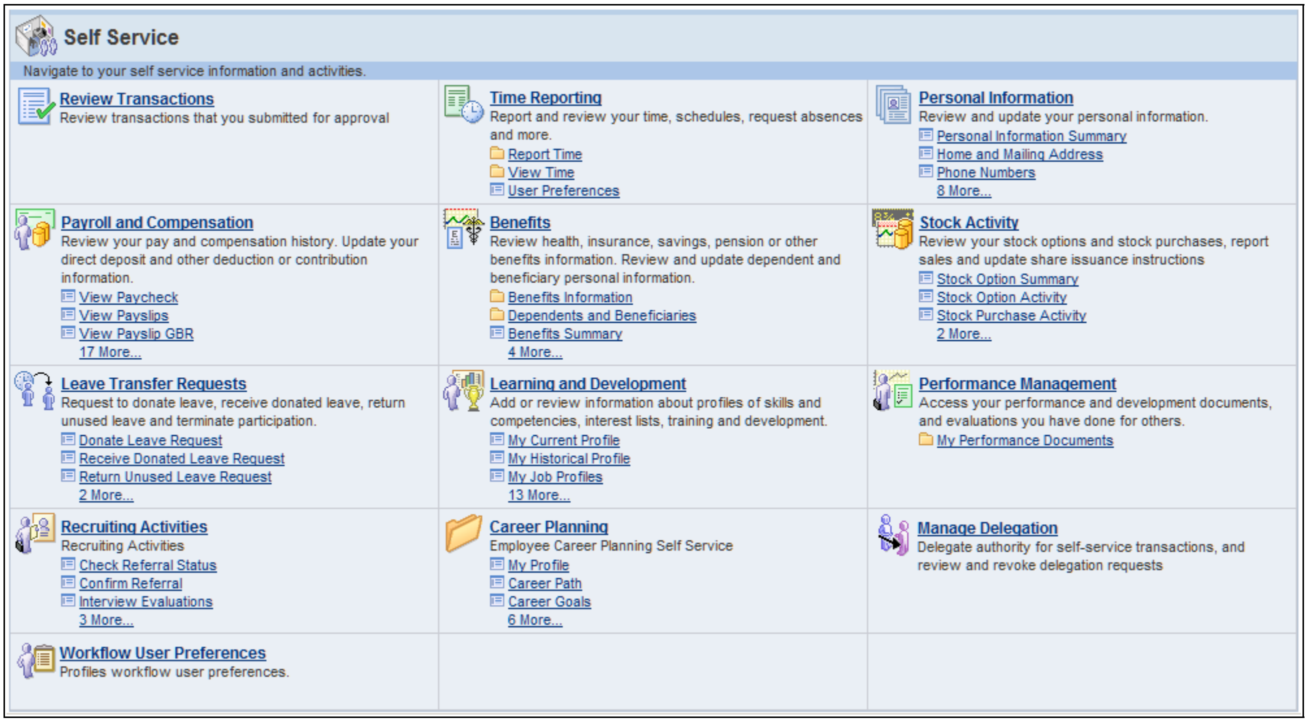
Use this page if you have more than one role in Service Center for Higher Education. Click the Select button to choose the role that you wish to be used when accessing a Service Center for Higher Education self-service case.

If you have multiple roles and you do not access this page to select the desired role to be used for Service Center for Higher Education self-service cases, the system will default your role by using the first role found for you in this hierarchy:

- Worker.
- Consumer (Constituent).
- Company Contact.

Accessing Self-Service Transactions in PeopleSoft HRMS

Access the (Employee) Self Service or Manager Self Service welcome page.



Self Service welcome page (PeopleSoft HRMS)

Manager Self Service welcome page (PeopleSoft HRMS)

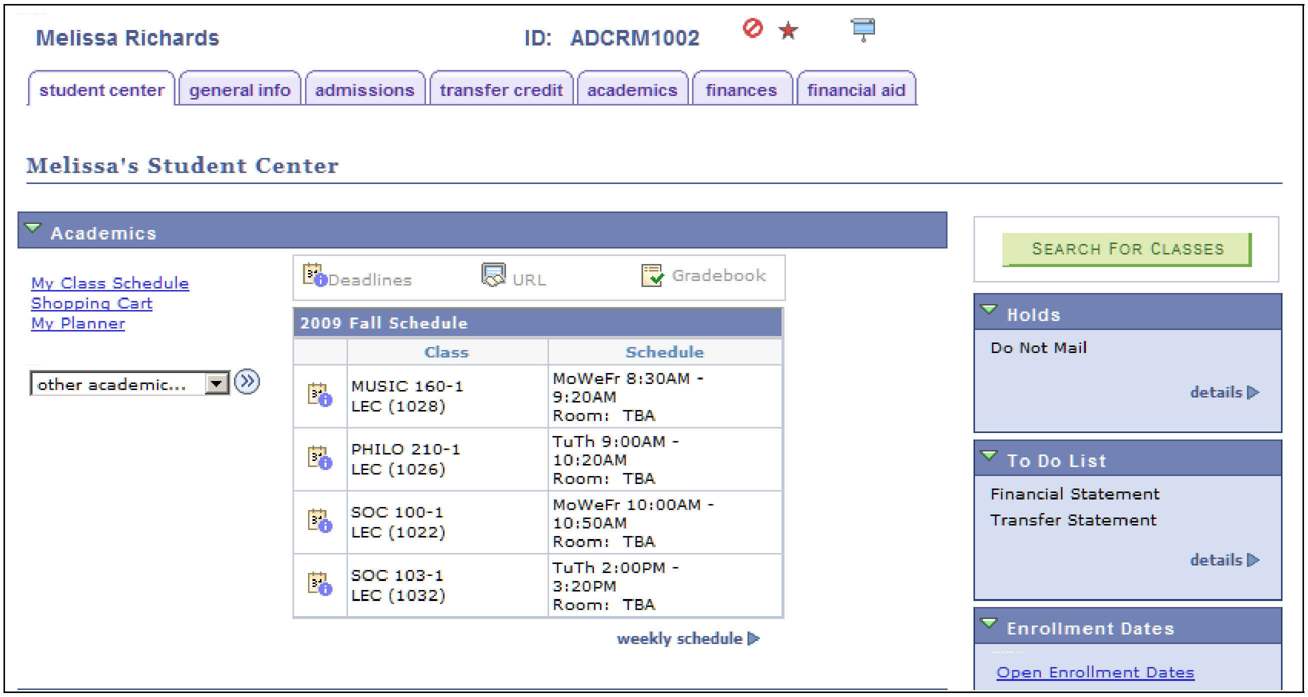
Click the links on these pages to access self-service transactions in PeopleSoft HRMS.

Note. PeopleSoft delivers URL identifiers for both the Manager Self Service page and the (Employee) Self Service page in PeopleSoft HRMS. To provide access to these pages from PeopleSoft CRM you must update the URLs with the correct server names for your PeopleSoft HRMS application. Go to PeopleTools, Utilities, Administration, URLs, URL Maintenance. Then select the RC_HD_HRHOME URL identifier and enter the correct URL for the page. Repeat the same process for the RC_HD_HRHOME_MGR URL identifier.

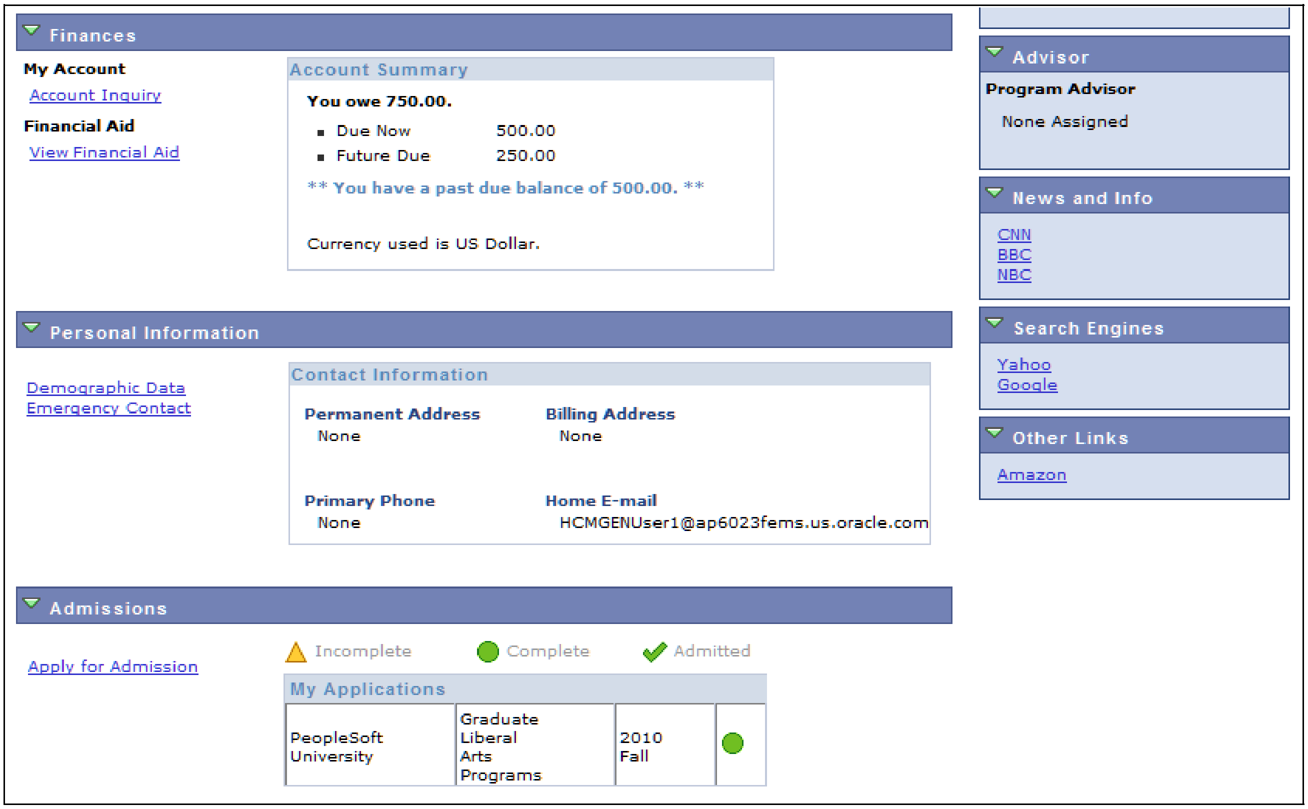
See *Enterprise PeopleTools 8.50 PeopleBook: System and Server Administration, "Using PeopleTools Utilities"*

Accessing Self-Service Transactions in PeopleSoft Campus Solutions

Access the Student Center welcome page (Service Center, Student Center).



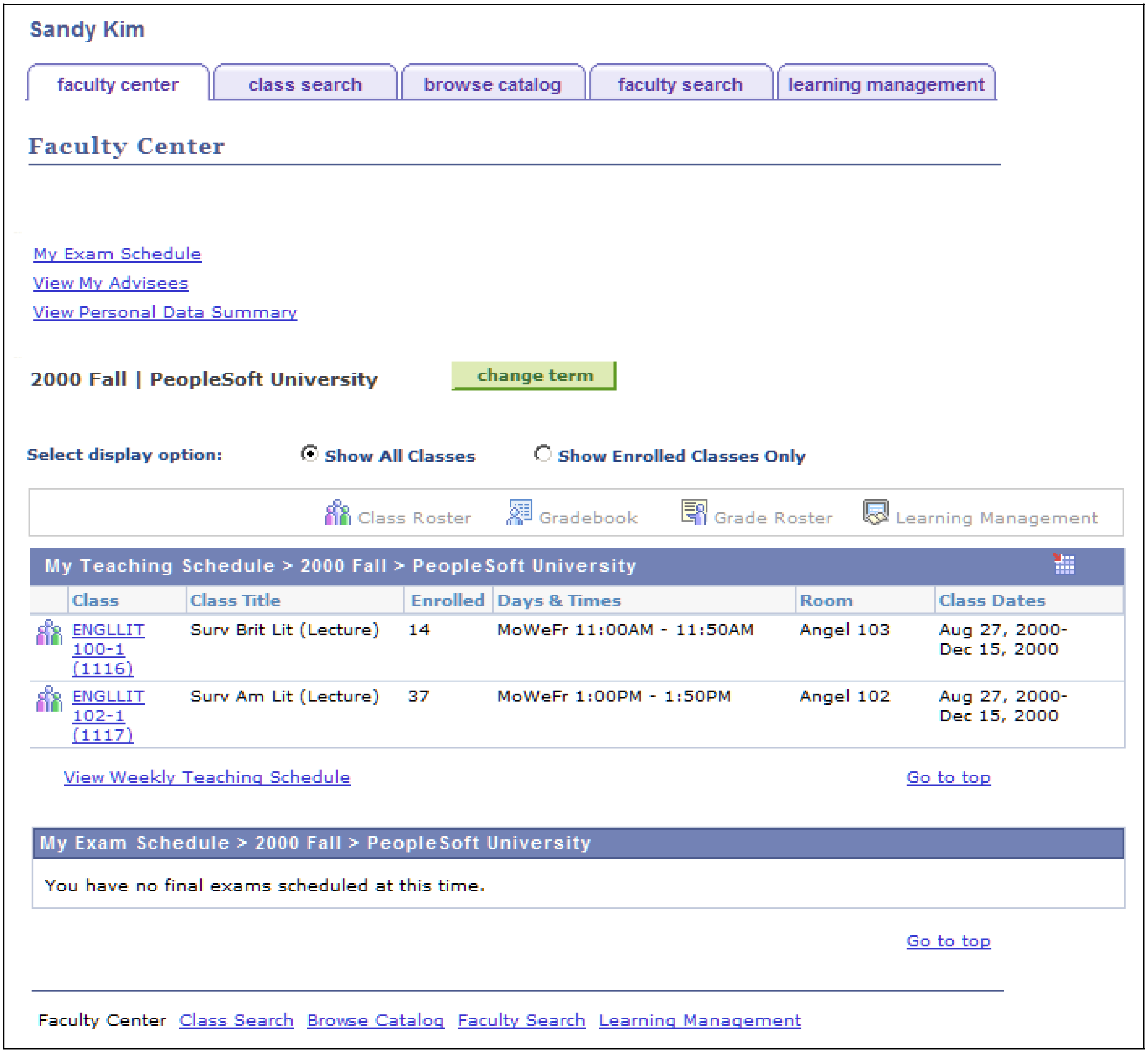
Student Center page (1 of 2) [PeopleSoft Campus Solutions]



Student Center page (2 of 2) [PeopleSoft Campus Solutions]

Click the links on this page to access self-service transactions in PeopleSoft Campus Solutions.

Access the Faculty Center welcome page (Service Center, Faculty Center).



Faculty Center page [PeopleSoft Campus Solutions]

Click the links on this page to access self-service transactions in PeopleSoft Campus Solutions.

Adding Cases

This section discusses how to:

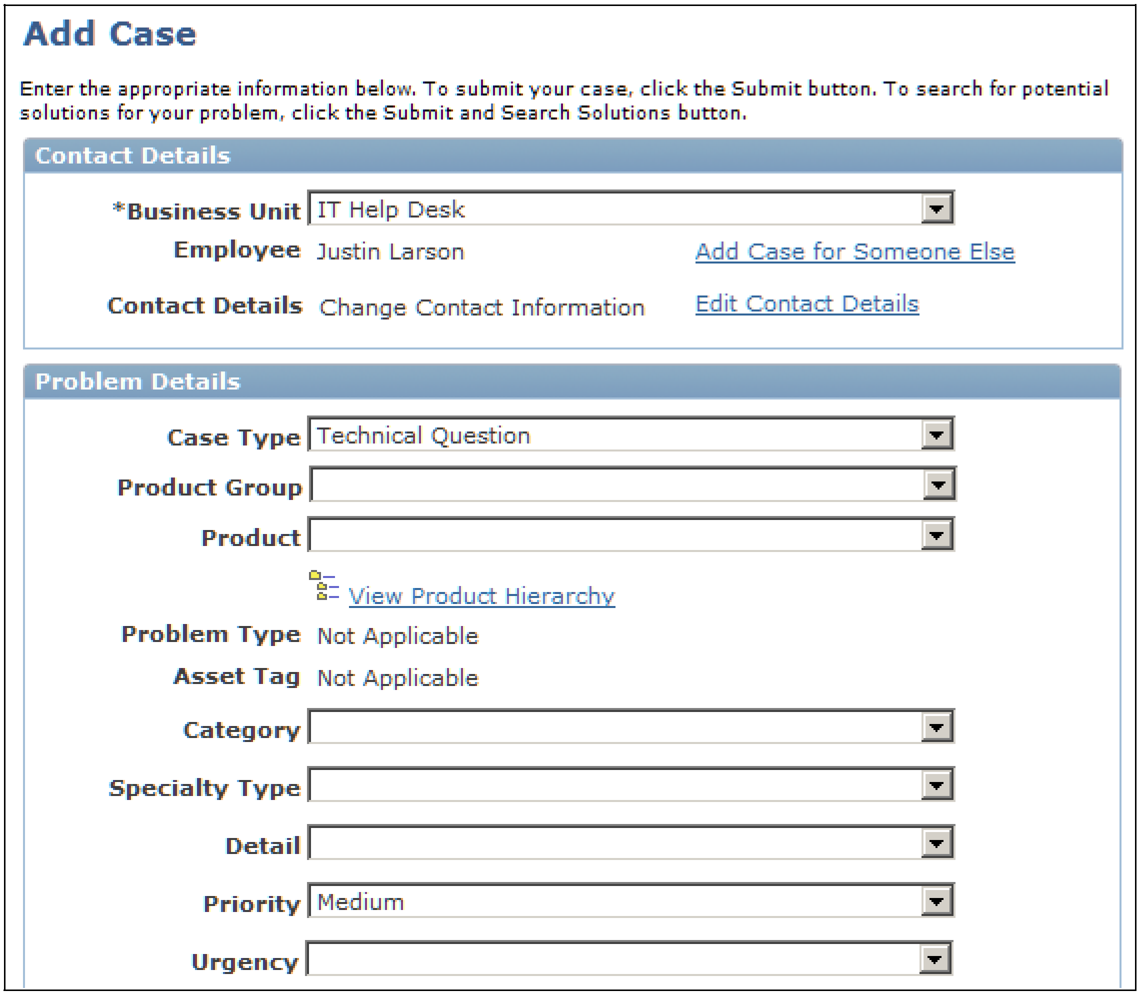
- Add cases.
- Look up employees.
- Edit contact information.

Pages Used to Add a Case

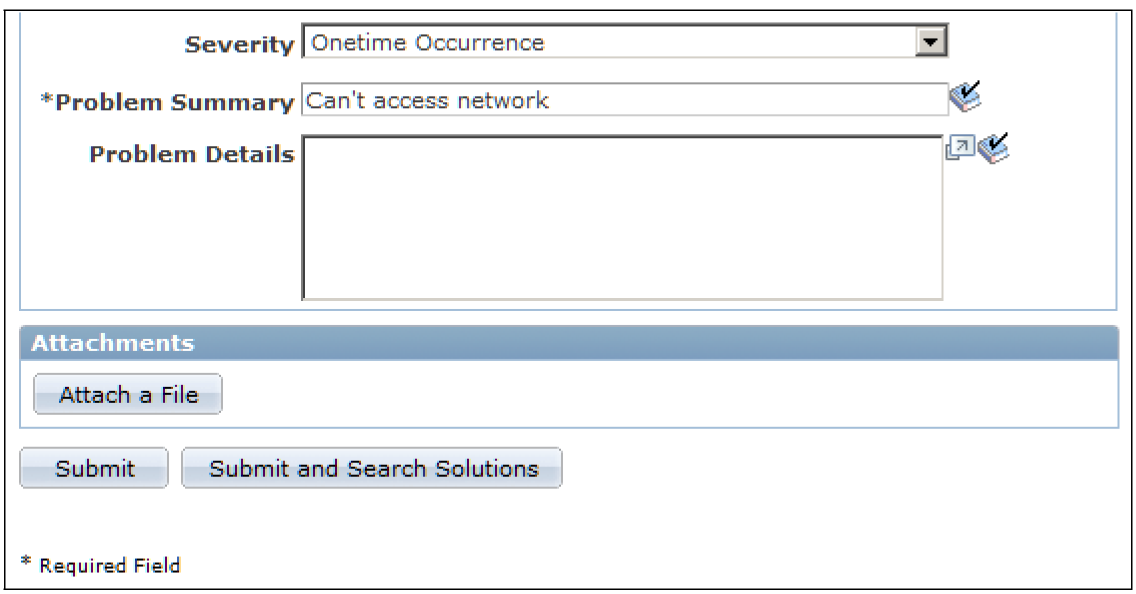
Page Name	*Definition Name*	*Navigation*	*Usage*
Add Case	RC_CASE_HD_SS_RPT RC_CASE_SW_SS_RPT	• On the Customer Care welcome page, click the Add Case link. • In the portal navigation menu, click Add Case. • Employee Self Service, Help Desk, Add Case • Employee Self Service, HR HelpDesk Add Case • Service Center, Add Case	Describe and submit a new problem.
Look Up Employee	RC_CASE_HD_SS_DIRR	Click the Add Case for Someone Else link on the Add Case page.	Look up and select an employee for whom you are adding a case. **Note.** This feature is only available for PeopleSoft HelpDesk applications.
Edit Contact Information	RC_CASE_HD_SS_CNTC	Click the Edit Contact Details link on the Add Case page.	Update contact information for the employee that is the contact on the case. **Note.** This feature is only available for PeopleSoft HelpDesk applications.

Adding Cases

Access the Add Case page (Employee Self Service, Help Desk, Add Case).



Add Case page (1 of 2)



Add Case page (2 of 2)

The visibility of page elements depends on how you configure the display template for this component. Also, some fields can be assigned default values based on business unit settings. The system enters default values even if the fields are hidden.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 15.

Contact Details

Business Unit

This field may have a different label, depending on how you configure self-service. This is a required field for cases. If you do not show business units on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page.

Note. If the user creates a case using a Business Unit that is different from the default self-service business unit established on the User Preferences - Call Center page, the system will update the user's default self-service business unit value with the newly selected value.

Customer

This read-only field displays the name of the customer. It can be the name of the company where the self-service application user works.

Employee

This read-only field displays the name of the employee who entered the case.

Add Case for your Direct Report

Click this link if you want to report a case on behalf of one of the people reporting directly to you. The system displays a list of your direct reports. To return to this page, select the employee for whom you want to report a case.

Note. The system displays this field for HR for HelpDesk cases only. PeopleSoft delivers this field as enabled with a security option that allows managers with roles that are associated with the Choose Direct Report (RC_CHOOSE_DIRECT_REPORT) functional option to enter cases on behalf of their direct reports. You can use the CRM_HHD display template for the RC_CASE_HD_SS_RPT case component to disable this field or change the security option.

Add Case for Someone Else

Click this link if you want to report a case on behalf of someone else. The system displays a list of workers that are already entered into PeopleSoft CRM. To return to this page, select the worker for whom you want to report a case.

Note. The system displays this field for HelpDesk cases only. PeopleSoft delivers this field as enabled with a security option that allows managers with roles that are associated with the On Behalf Of (RC_ON_BEHALF_OF) functional option to enter cases on behalf of other workers. You can use the RC_HELPDESK display template for the RC_CASE_HD_SS_RPT case component to disable this field or change the security option.

Contact

This read-only field displays the name of the contact that represents the company.

Contact Details This read-only field displays the contact's primary contact method.

Edit Contact Detail Click this link to change the contact person specified in the Customer field or the Employee field.

Account Number The system displays this field for communications and energy customers who are using PeopleSoft Support. Use this field to select the account that you want to submit a case against.

The system filters the information that is available in the drop-down list box based on security that is defined at the account level.

See *PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook*, "Setting Up Security and User Preferences," Defining Application Security.

Reported By This field displays after a manager has selected a direct report or worker to report a case on behalf of. The system displays this field only if the person reporting the case is different from the person for whom the case was reported.

Problem Details

Case Type Select the type of case you are adding.

Product Group Select the product group associated with the case you are adding.

The system filters the values for product and installed product to only display the products and installed products contained within the specified product group.

Product Select the product associated with the case you are adding.

PeopleSoft Support and PeopleSoft HelpDesk derive the list of products differently:

- In PeopleSoft Support, the field prompts against the product descriptions for the user's installed products. A product description appears only once, even if a user has more than one installed version of a particular product.
- In PeopleSoft HelpDesk and Service Center for Higher Education applications, the field prompts against all product descriptions.

View Product Hierarchy Click this link to go to the Installed Product Hierarchy page where you can search for installed products by product ID, product name, site name, and installed status.

Problem Type Select the problem type associated with the case you are adding.

Problem types are defined by product. This gives you an additional level of categorization for the problem. Because problem type is a child of Product, the Problem Type field on the Case page derives its values from product. If the Problem Type field is visible, be sure that the descriptions of your product competencies make sense to a self-service user who is selecting a problem type. Valid problem types depend on the product that the user selects.

Serial Number and **Asset Tag**

The serial number appears in PeopleSoft Support and PeopleSoft Service Center for Higher Education. The asset tag appears in PeopleSoft HelpDesk and PeopleSoft Service Center for Higher Education. Both fields prompt against the user's installed products. Valid values are limited based on the product that the user selects. Blank values might appear if the user has installed products that do not have serial numbers or asset tags.

Category, Specialty Type, Detail, Priority, Urgency, Severity, Summary, and **Details**

Select or enter information in these fields to describe the type of problem you are having.

Incident Address

Address, Edit, and **Detail**

If you are not sure about the full address, click Edit and select *Intersection* and then enter information about the location where the problem occurred in the Address fields or the Detail field.

If you know the exact address, select Edit and then enter the information in the address fields (PeopleSoft Support only).

Attachments

Attach a File

Click this button to attach a file to the case.

Submit and **Submit and Search Solutions**

Click one of these buttons to submit your case. After you submit the case, the page changes as follows:

- If you just submit the case, a confirmation message appears at the top of the page, giving you the case number for the newly submitted case.

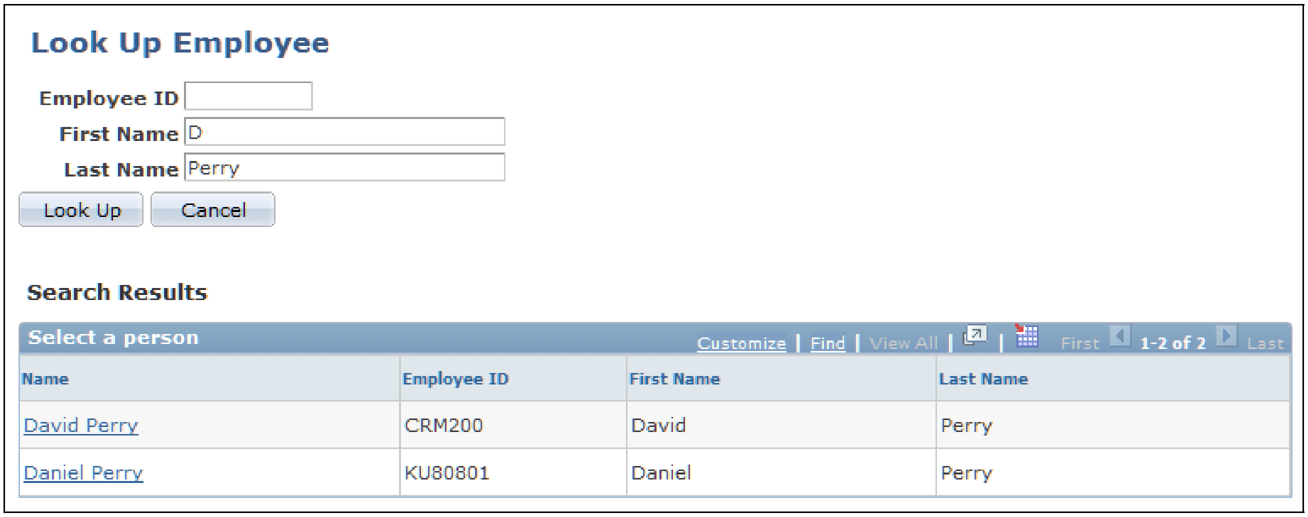
  All fields become read-only, and the system does not display the Submit and Submit and Search Solutions buttons.

- If you submit the case and search for solutions, the system displays the solution pages.

  If you find a solution that solves your problem, click Yes. The system returns you to the Manage Case page and the message *Case Resolved Successfully* appears at the top.

Looking Up Employees

Access the Look Up Employee page (click the Add Case for Someone Else link on the Add Case page).



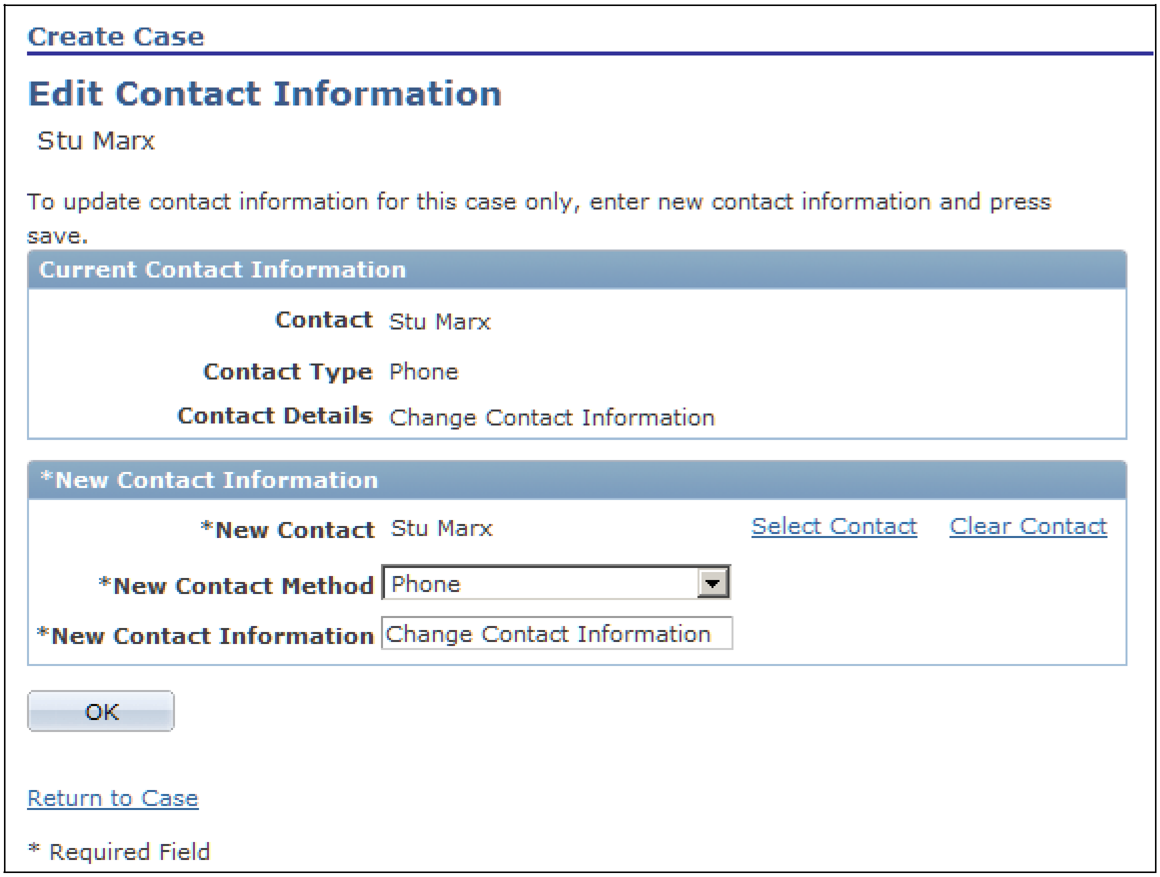
Look Up Employee page

Enter your search criteria in the fields at the top of the page and then click Look Up. Click the name of the employee for whom you are reporting a case. The system returns to the Add Case page.

Note. This page is part of the HelpDesk for Human Resources reported-by feature. The system displays this page, when you click the Add Case for Someone else field. PeopleSoft enables this link for HelpDesk for Human Resources customers when you first install the application. This field is used to report cases for your direct reports. If you have properly set up the integration between HRMS and CRM, then the system retrieves the direct report details directly from the PeopleSoft HRMS database.

Editing Contact Information

Access the Edit Contact Information page (click the Edit Contact Details link on the Add Case page).



Edit Contact Information page

Use the fields in the New Contact Information section to change contact information for the case on which you are currently working. To add another contact click the Select Contact link. To erase the contact that is displayed, click the Clear Contact link. Click OK when you are finished. The system returns you to the Add Case page.

Managing Existing Self-Service Application Cases

This section discusses how to:

- Search for cases.
- Manage cases.
- View problem descriptions.
- View case notes.
- Enter a new case note.
- Enter the reason for closing a case.
- Enter the reason for reopening a case.

- Change contact information.

Note. You can display a group box for billing information by selecting this option on the display template. This section is delivered hidden.

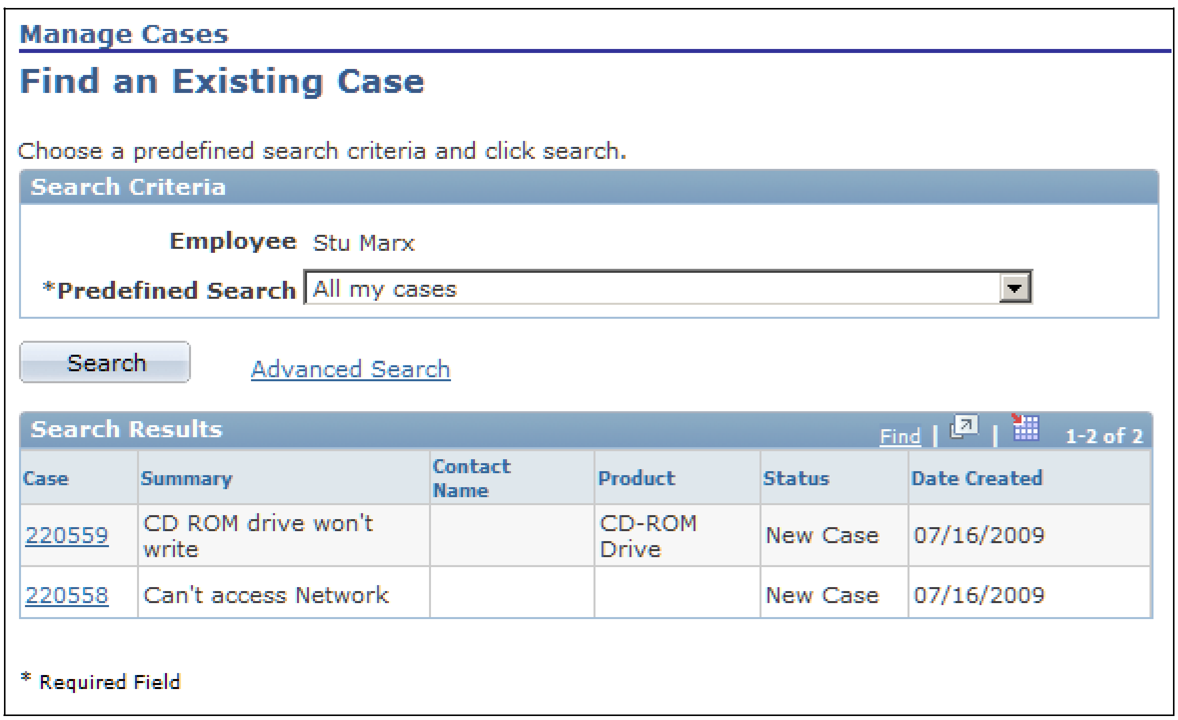
Pages Used to Manage Cases

Page Name	*Definition Name*	*Navigation*	*Usage*
Manage Cases - Find an Existing Case	RC_CASE_SW_SS_SRCH RC_CASE_HD_SS_SRCH	• On the Customer Care page, click the Manage Cases link. • Employee Self Service, Help Desk, Manage Cases • Employee Self Service, HR Help Desk, Manage Cases • Service Center, Manage Cases	Search for cases to view in more detail.
Manage Case	RC_CASE_SW_SS RC_CASE_HD_SS	Select a case from the list of search results on the Find an Existing Case page.	View case information. This page is also the starting point for several other processes: adding notes, changing contact information, requesting that an agent contact the user, searching for new solutions, and viewing solutions that are already under consideration for this case.
Manage Case - Problem Description	RC_CASE_SW_SS_PROB RC_CASE_HD_SS_PROB	On the Manage Case page, click the Problem Summary link.	View the complete problem description if the summary on the Manage Case page does not provide enough information.
Manage Case - Note Details	RC_CASE_SW_SS_NDTL RC_CASE_HD_SS_NDTL	On the Manage Case page, click the summary for a note in the Notes and Attachments Summary grid.	View case notes and attachments.
Manage Case - Add Note or Attachment	RC_CASE_SW_SS_NADD RC_CASE_HD_SS_NADD	On the Manage Case page, click the Add Note or Attachment button.	Enter a new case note. **Note.** You must save the case to save the note.

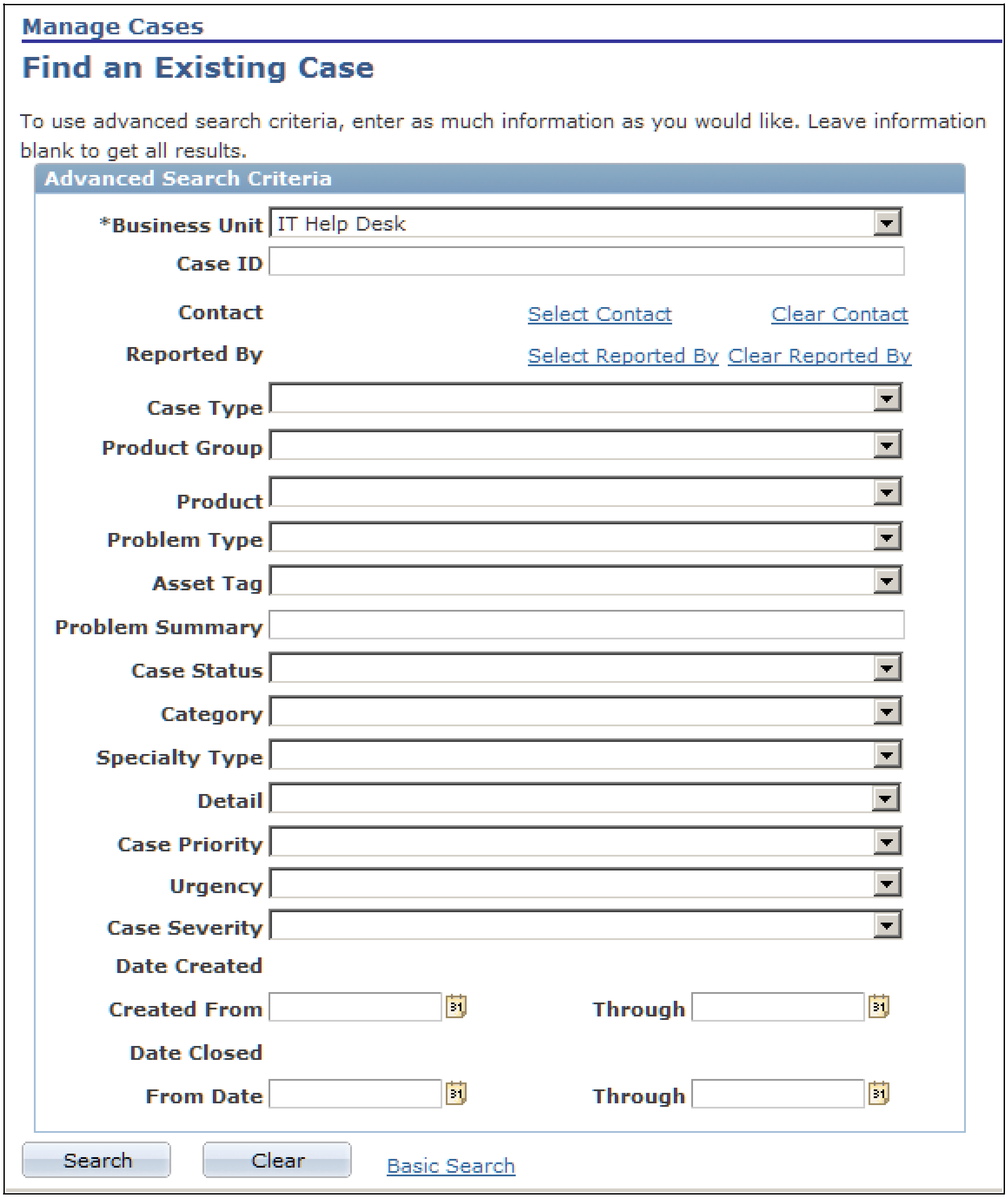
Page Name	***Definition Name***	***Navigation***	***Usage***
Manage Case - Close Case	RC_CASE_SW_SS_CLSE RC_CASE_HD_SS_CLSE	On the Manage Case page, click the Close Case button. This button is available only if the business unit rules permit self-service users to close cases.	Select or enter the reason for closing an open case.
Manage Case - Reopen Case	RC_CASE_SW_SS_ROPN RC_CASE_HD_SS_ROPN	On the Manage Case page, click the Reopen Case button. This button is available only if the business unit rules permit self-service users to close cases.	Select or enter the reason for reopening a closed case. Reopening a case causes all successful resolutions to be marked as failed solutions.
Manage Case - Edit Contact Information	RC_CASE_SW_SS_CONT RC_CASE_SW_SS_CNTC RC_CASE_HD_SS_CNTC	Click the Edit Contact Details link on the Create Case page or the Manage Case page.	Change the contact information for a case.

Searching for Cases

Access the Manage Cases - Find an Existing Case page (on the Customer Care page, click the Manage Cases link).



Manage Cases - Find an Existing Case page (basic)



Manage Cases - Find an Existing Case page (advanced)

Note. The first screen shot shows the Case Search page in basic search mode. The second screen shot shows the page in advanced search mode. Note that you must click the Select Contact link to access contact information.

Values in one field are not dependent on values in any other. For example:

- Values are not limited by the selected business unit.

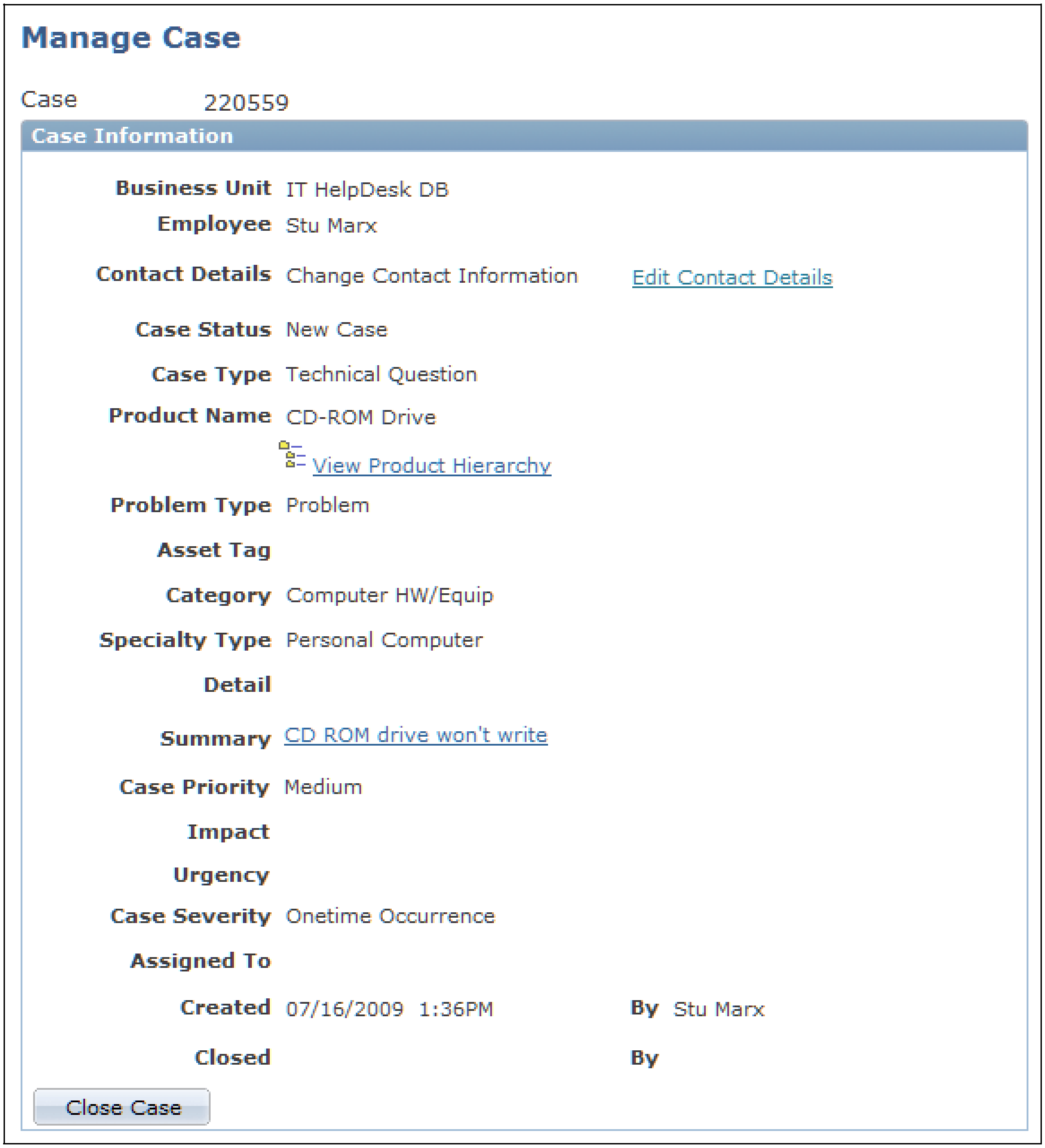
- Entering a category does not limit the values for the Specialty Type or Detail fields, and entering a specialty type does not limit the values for the Detail field.

See Also

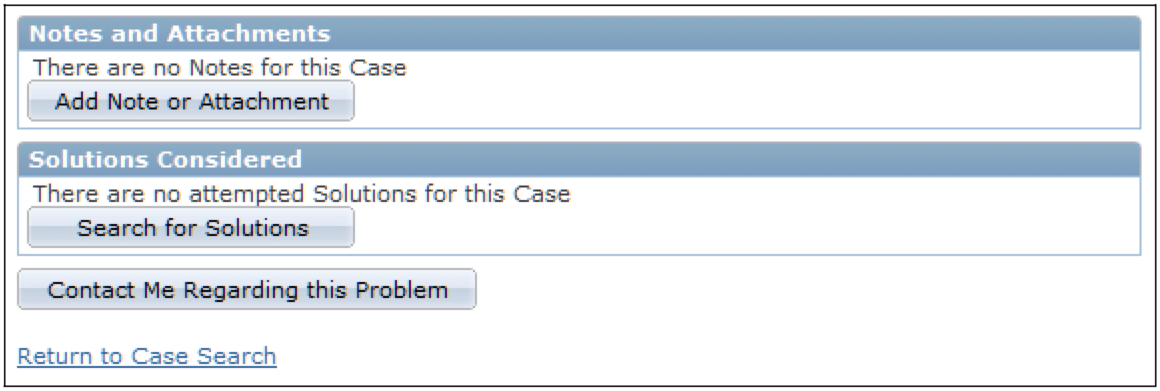
Chapter 20, "Configuring Self-Service Applications," Updating Search Descriptions, page 481

Managing Cases

Access the Manage Case page (select a case from the list of search results on the Find an Existing Case page).



Manage Case page (1 of 2)

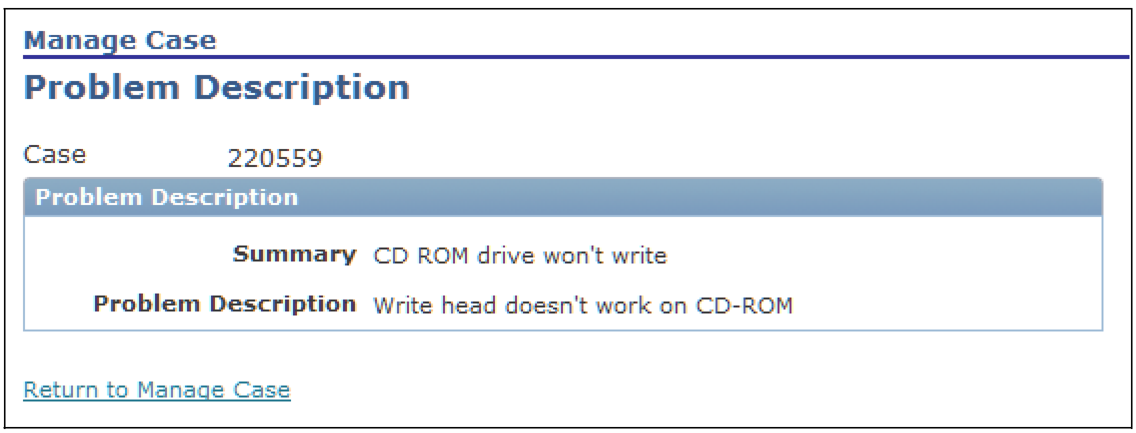


Manage Case page (2 of 2)

Use this page to edit contact details, view product hierarchies, view product descriptions, add notes and attachments, search for solutions, and close and open the case.

Viewing Problem Descriptions

Access the Manage Case - Problem Description page (on the Manage Case page, click the Problem Summary link).

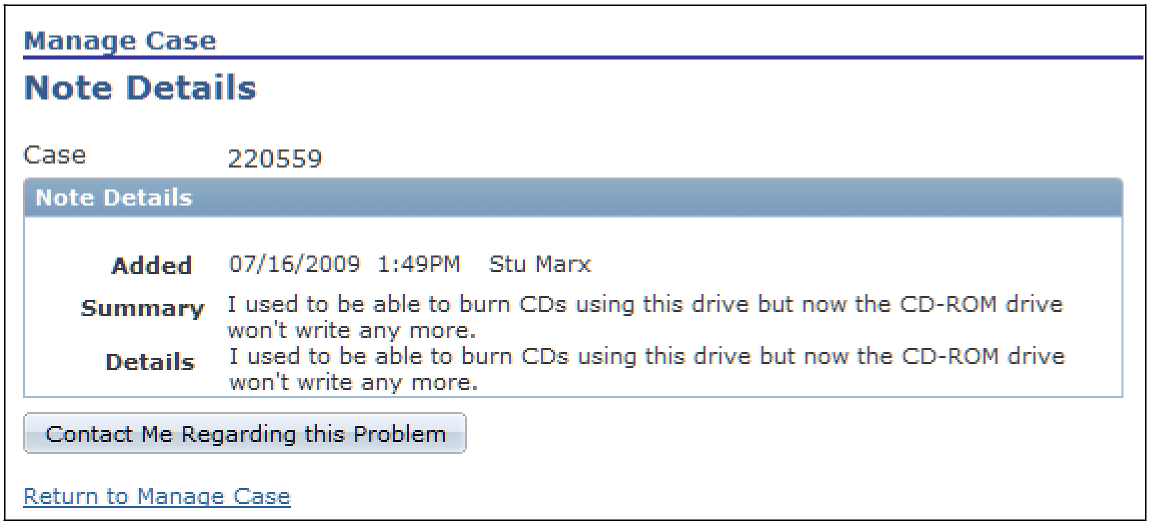


Manage Case - Problem Description page

Click the Return to Manage Case link to go back to the Manage Case page.

Viewing Case Notes

Access the Manage Case - Note Details page (on the Manage Case page, click the summary for a note in the Notes and Attachments Summary grid).

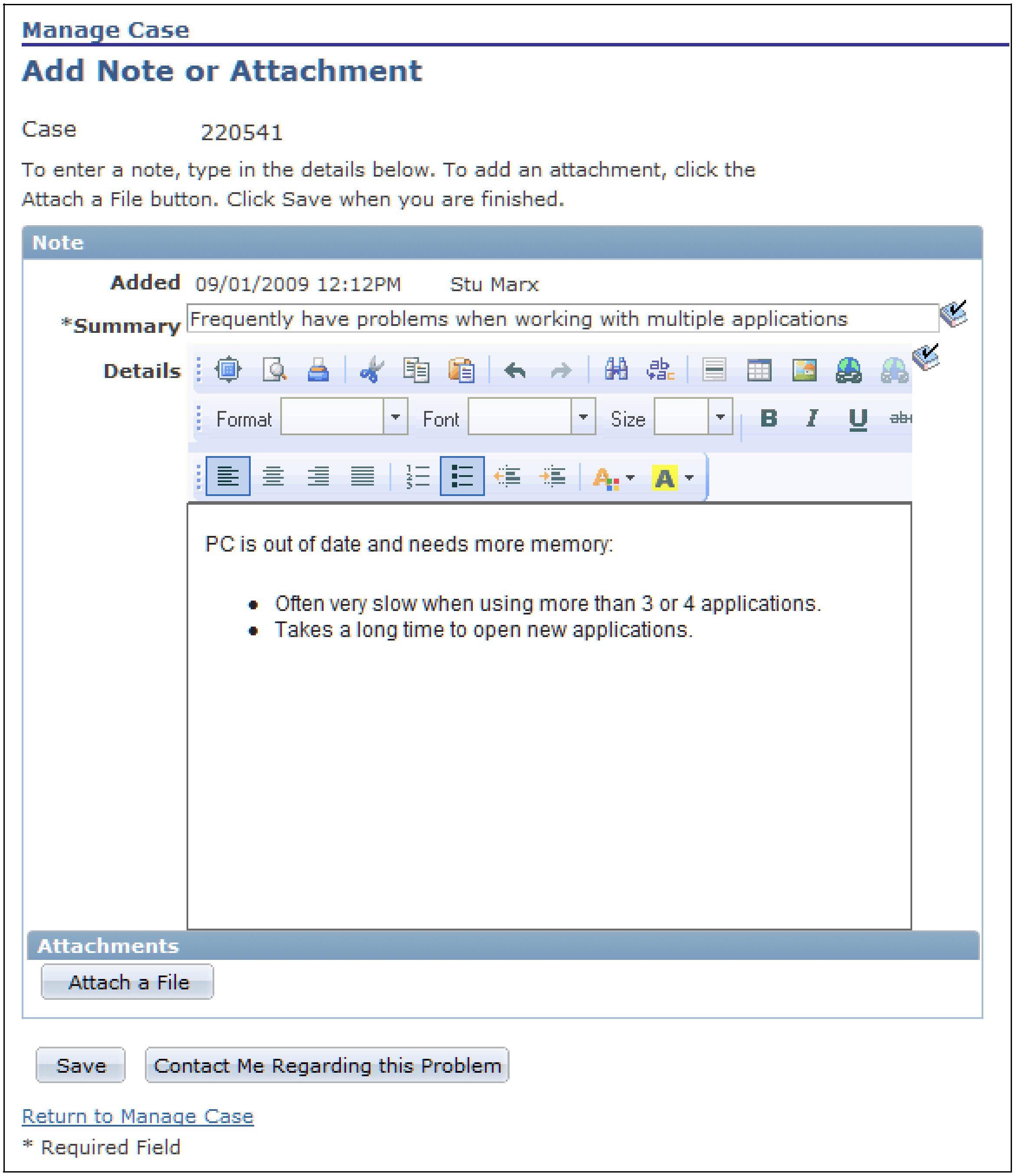


Manage Case - Note Details page

Click the Return to Manage Case link to go back to the Manage Case page.

Entering a New Case Note

Access the Manage Case - Add Note or Attachment page (on the Manage Case page, click the Add Note or Attachment button).



Manage Case - Add Note or Attachment page

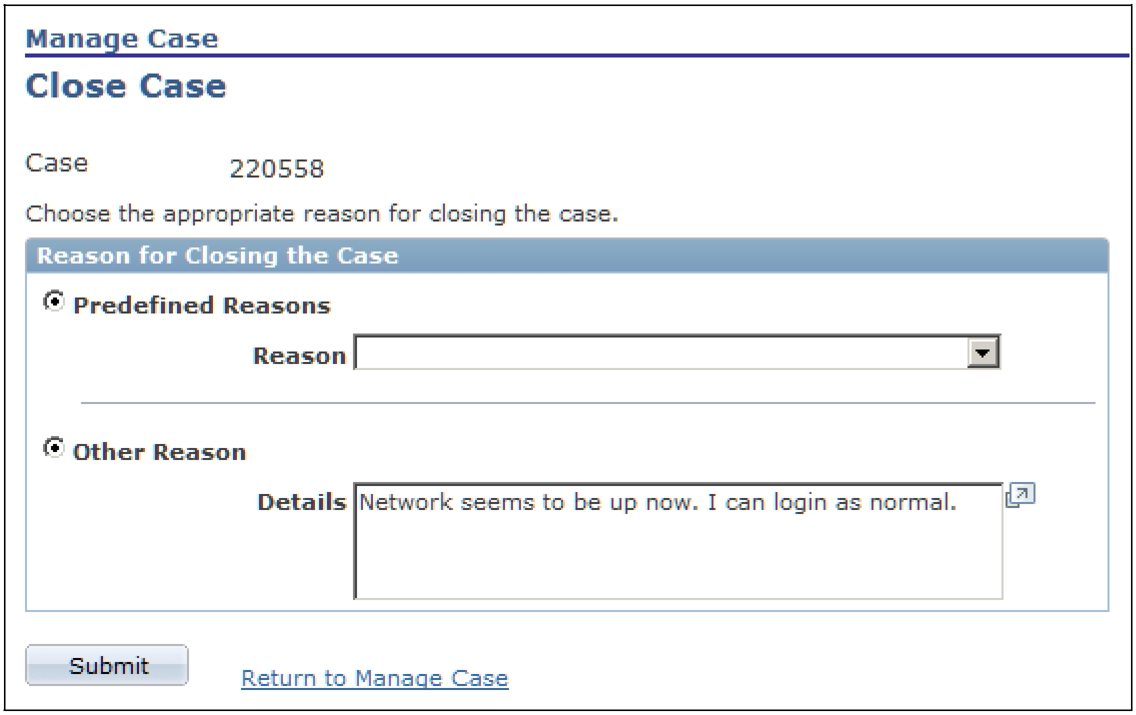
Use the fields on this page to add notes and attachments. Click the Attach a File button to add files from your computer to the case. Click Save when you are finished. Click the Contact Me Regarding this Problem button if you need further help and you want someone to call you.

See Also

PeopleSoft Enterprise CRM 9.1 Application Fundamentals PeopleBook, "Working with Notes and Attachments," Adding Attachments to Notes

Entering the Reason for Closing a Case

Access the Manage Case - Close Case page (on the Manage Case page, click the Close Case button).



Manage Case - Close Case page

Predefined Reasons and **Reason**

Select the Predefined Reasons option and then select one of the predefined reasons from the Reason drop-down list box. The available reasons include: *Case Canceled, Case Resolved,* and *Duplicate Case.*

Other Reason and **Details**

Select this option and enter the reason in the Details field if you want to enter a free-form text reason.

Submit

When the user clicks this button, the system changes the case status to the value that is specified in the Closed Case Status field on the Case Defaults page.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Setting Up Case Defaults, page 40.

If a user selects a predefined reason from the Reason field, the system resolves the case by using the solution that is identified on the Reason and Solution Link page.

If no solution is linked to the selected reason code, the system creates one (using the solution type *Canned)* and updates the Reason and Solution Link page accordingly.

If a user entered a reason in the Details field, the system uses the text to create a new solution of type *Adhoc.* The solution then resolves the case using the newly created solution.

See Also

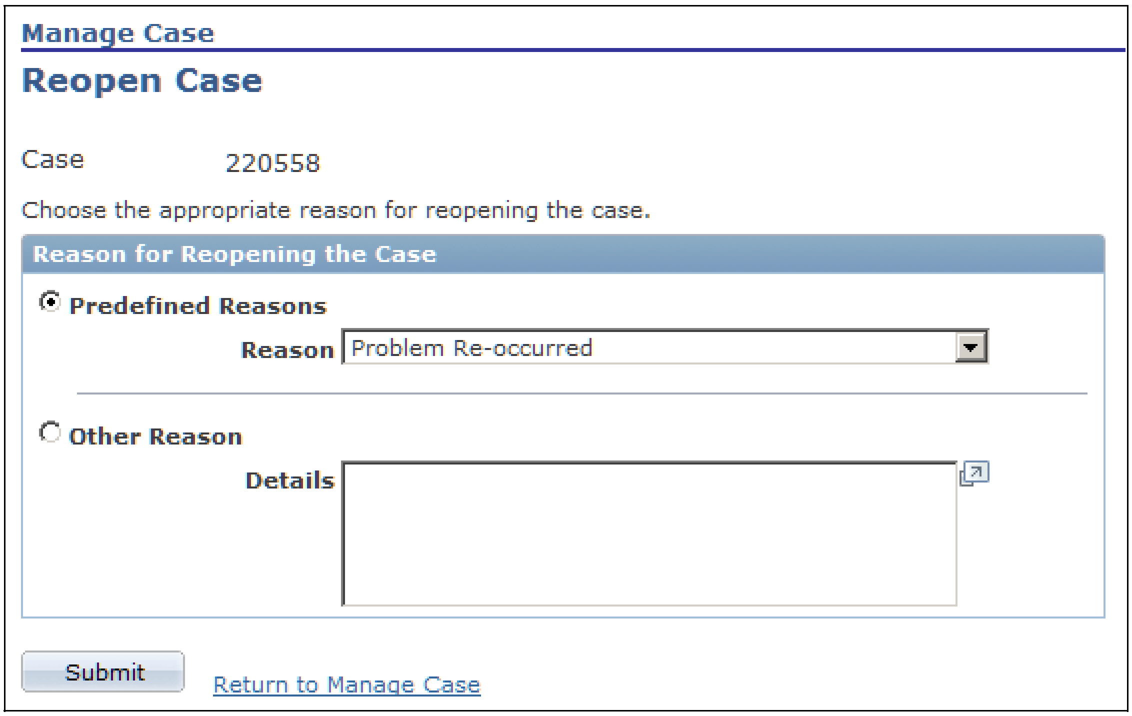
Chapter 20, "Configuring Self-Service Applications," Associating Solutions with Reasons for Closing Cases, page 480

Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Reason Codes, page 83

Chapter 2, "Defining Call Center Business Units and Display Template Options," Setting Up Case Defaults, page 40

Entering the Reason for Reopening a Case

Access the Manage Case - Reopen Case page (on the Manage Case page, click the Reopen Case button).



Manage Case - Reopen Case page

Predefined Reasons and **Reason**	Select the Predefined Reasons option and then select one of the predefined reasons from the Reason drop-down list box. The available reasons include: *Problem Re-occurred,* and *Resolution Failed.*
Other Reason and **Details**	Select this option and enter the reason in the Details field if you want to enter a free-form text reason.
Submit	When the user clicks this button, the system changes the case status to the value that is specified in the Reopened Case Status field on the Case Defaults page. The reason (either predefined or free-form text) becomes a resolution note.

See Also

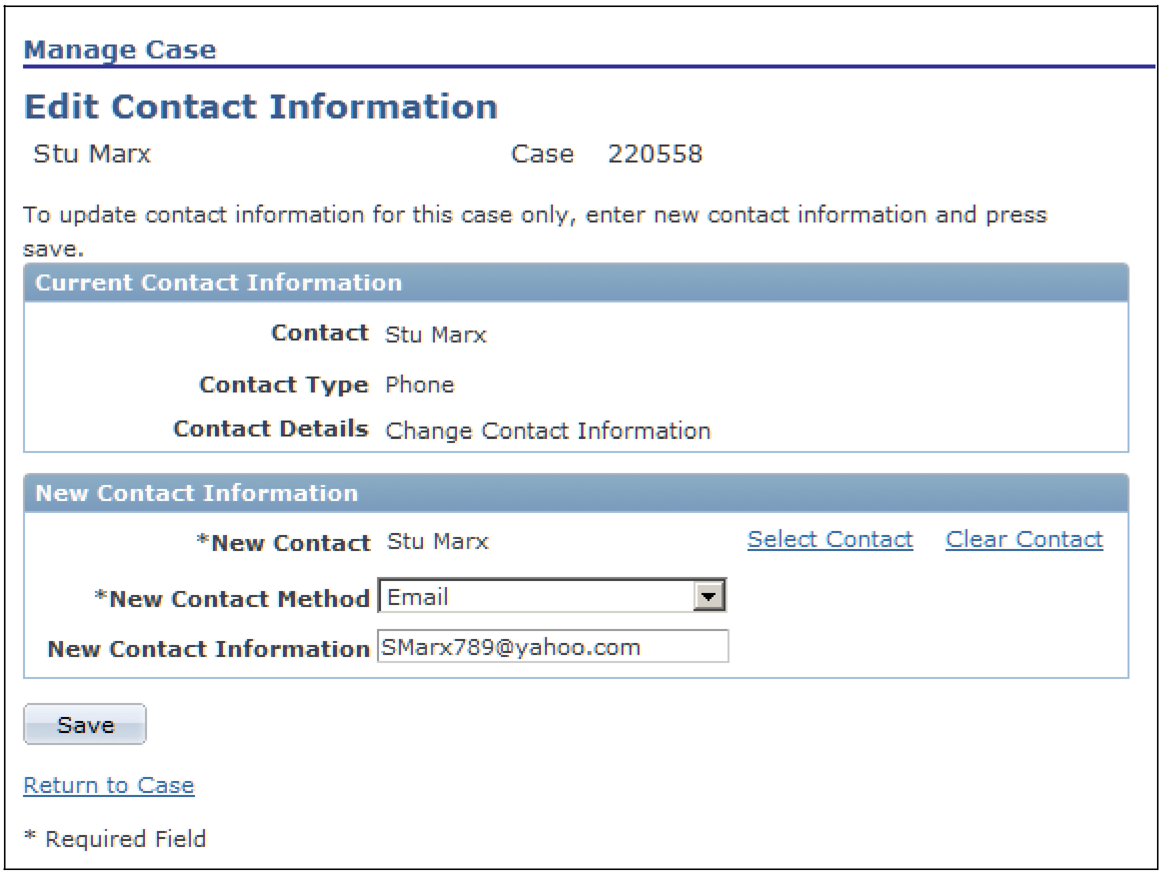
Chapter 20, "Configuring Self-Service Applications," Associating Solutions with Reasons for Closing Cases, page 480

Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Reason Codes, page 83

Chapter 2, "Defining Call Center Business Units and Display Template Options," Setting Up Case Defaults, page 40

Changing Contact Information

Access the Manage Case - Edit Contact Information page (click the Edit Contact Details link on the Create Case page or the Manage Case page).



Manage Case - Edit Contact Information

The appearance of this page varies slightly depending on whether the user is a company contact person (PeopleSoft Support), a consumer (PeopleSoft Support), or a worker (PeopleSoft HelpDesk).

You can change contact information when you are creating a new case or viewing an existing case.

On the Create Case page, the Change Contact Information button is available only until the case is submitted. After submitting the case, use the Manage Cases component to change the contact information.

Searching for Solutions

This section discusses how to:

- Perform a basic solution search.
- Perform a frequently used solution search.
- Search for solutions using field-specific search criteria.
- Use the Solution Summary page.

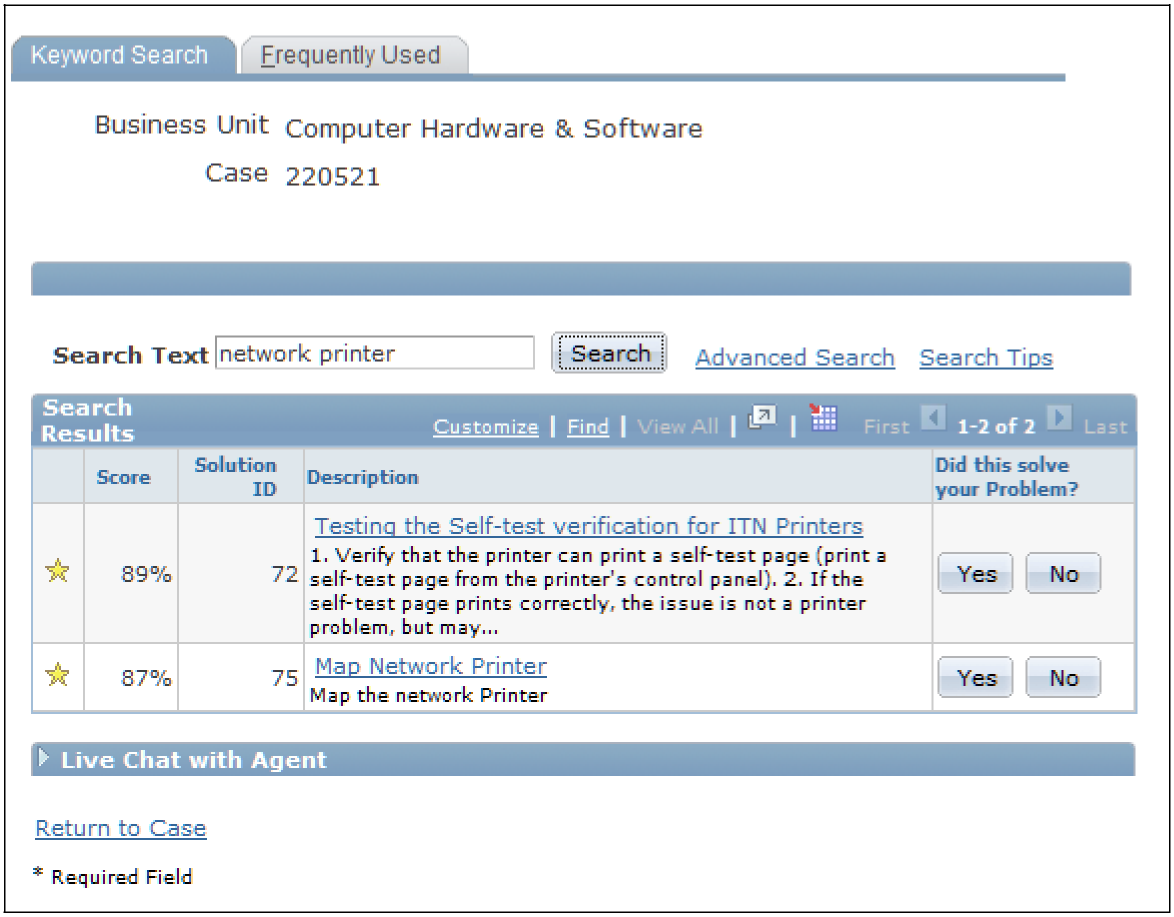
Pages Used to Search for Solutions

Page Name	***Definition Name***	***Navigation***	***Usage***
Keyword Search	RC_SOLNSRCH_SW_SS RC_SOLNSRCH_HD_SS	• On the Customer Care page, click the Search Resolutions link (PeopleSoft Support only); then click Keyword Search. • On the Search Solution - Advanced page, click the Basic Search link. • On the Manage Case page, click the Search for Solutions button; then click Keyword Search. • On the Add Case page, click the Submit and Search Solutions button; then click Keyword Search. • Employee Self-Service, Search Solutions, Keyword Search (PeopleSoft HelpDesk applications only). • Service Center , Search Solutions, Keyword Search (PeopleSoft Service Center for Higher Education application only).	Perform a basic solution search.

Page Name	Definition Name	Navigation	Usage
Frequently Used	RC_SOLNSRCHF_HD_SS	• On the Customer Care page, click the Search Resolutions link; then click Frequently Used (PeopleSoft Support only). • On the Search Solution - Advanced page, click the Basic Search link; then click Frequently Used. • On the Manage Case page, click the Search for Solutions button; then click Frequently Used. • On the Add Case page, click the Submit and Search Solutions button; then click Frequently Used. • Employee Self-Service, Search Solutions, Frequently Used (PeopleSoft HelpDesk applications only)	Search for frequently used solutions.
Keyword Search (advanced)	RC_SOLADVSRH_SW_SS RC_SOLADVSRH_HD_SS	On the Search Solution page, click the Advanced Search link.	Search for solutions using field-specific search criteria.
Search Solution - Solution Summary	RC_SOLN_SUMM_SW_SS RC_SOLN_SUMM_HD_SS	On the Keyword Search or Keyword Search - Advanced page, click the summary of a solution in the search results list.	View a solution and indicate whether the solution solved a problem.
Search Solution - Related Solution	RC_RELA_SOLN_HD_SS	On the Search Solution - Solution Summary page, click the solution summary in the Related Solutions grid.	View a related solution and indicate whether the solution solved a problem.

Performing a Basic Solution Search

Access the Keyword Search page (on the Manage Case page, click the Search for Solutions button; then click Keyword Search).



Keyword Search page (basic)

Business Unit

The business unit is required; only solutions from the corresponding setID are included in the search results. If you configure self-service so that the field is not visible, you must make sure that each user has a default business unit that will populate the field.

The business unit prompt shows business units for all markets.

Search Text

When searching by keyword, Solution Advisor performs a Verity search that looks for the keyword in any field that is included in the search index template for solutions. Restricting keyword searches by product is optional.

Advanced Search

Click this link to access the Search Solution page for advanced searches, which accepts field-specific search criteria.

Search

Click this button to perform a search. The search results appear at the bottom of the page.

Add Case

This link appears when you are searching for solutions outside the context of a case.

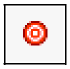
Return

This link appears when you are searching for solutions within the context of a case.

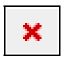
In PeopleSoft self-service, the solution pages display these icons along with the search results:

If the solved count for the solution is equal to zero, the system displays the Newly created solution icon.

If the Solution newly created period check box has been selected on the relevant Call Center Business Unit setup page, the system will additionally only show the new icon if the age of the solution does not exceed that specified for the Solution newly created period option.



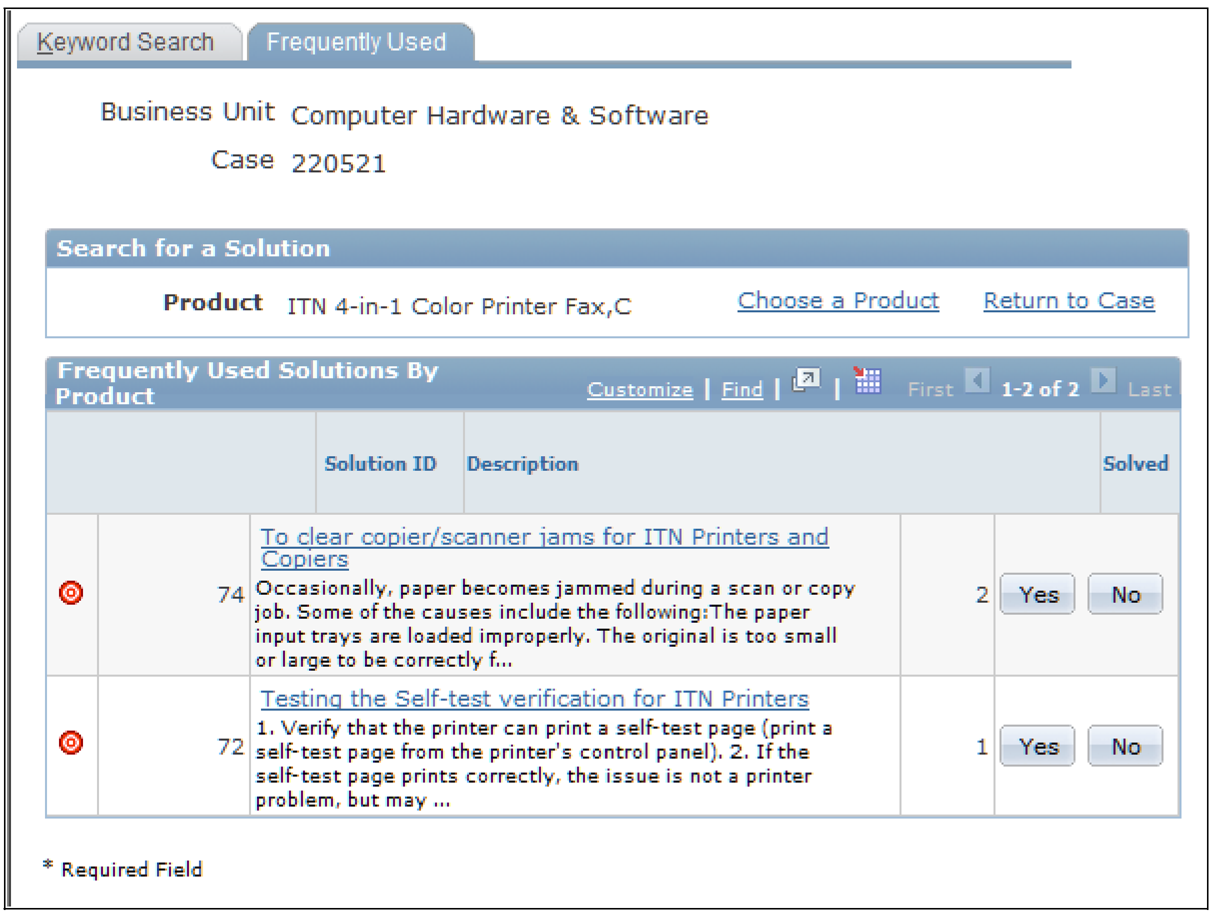
If the solved count for the solution is greater than zero, the system displays the Top ten solution icon.



If the solution was already used but it could not resolve the issue, the system displays the Solution tried already icon.

Performing a Frequently Used Solution Search

Access the Frequently Used page (on the Manage Case page, click the Search for Solutions button; then click Frequently Used).



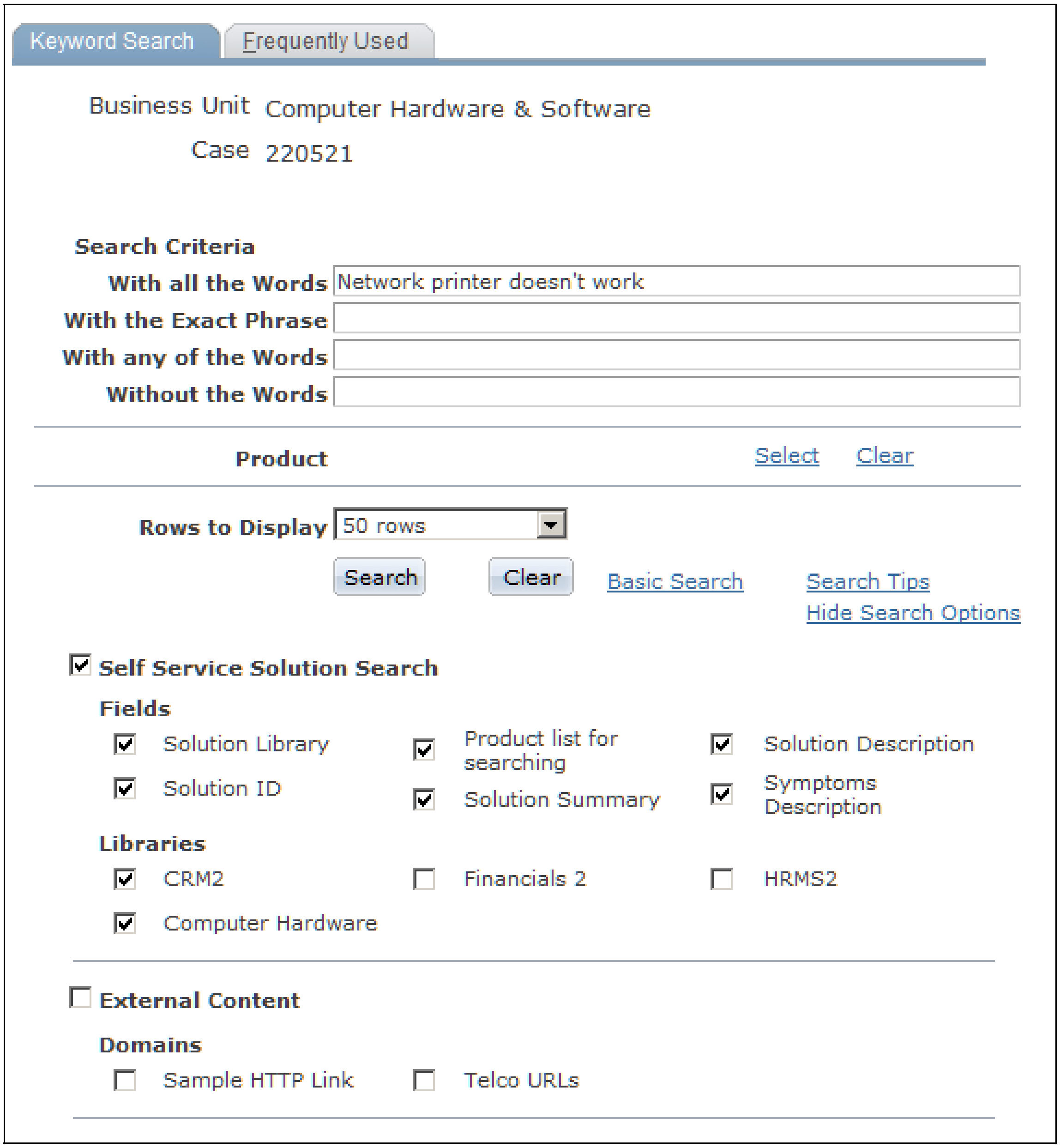
Frequently Used page

To search for frequently used solutions, first select a product by clicking the Choose a Product link.

Note. Self-service users can only search on active solutions. Solutions that are categorized as either canned or adhoc do not appear in searches on the Frequently Used solutions page for both agents and self-service users.

Searching for Solutions by Using Field-Specific Search Criteria

Access the Keyword Search - Advanced page (on the Search Solution page, click the Advanced Search link).



Keyword Search (advanced)

Use this page to search for solutions using different criteria. Use the open fields at the top of the page or select the check boxes that appear in the lower portion of the page. Additionally, you can search for solutions by product.

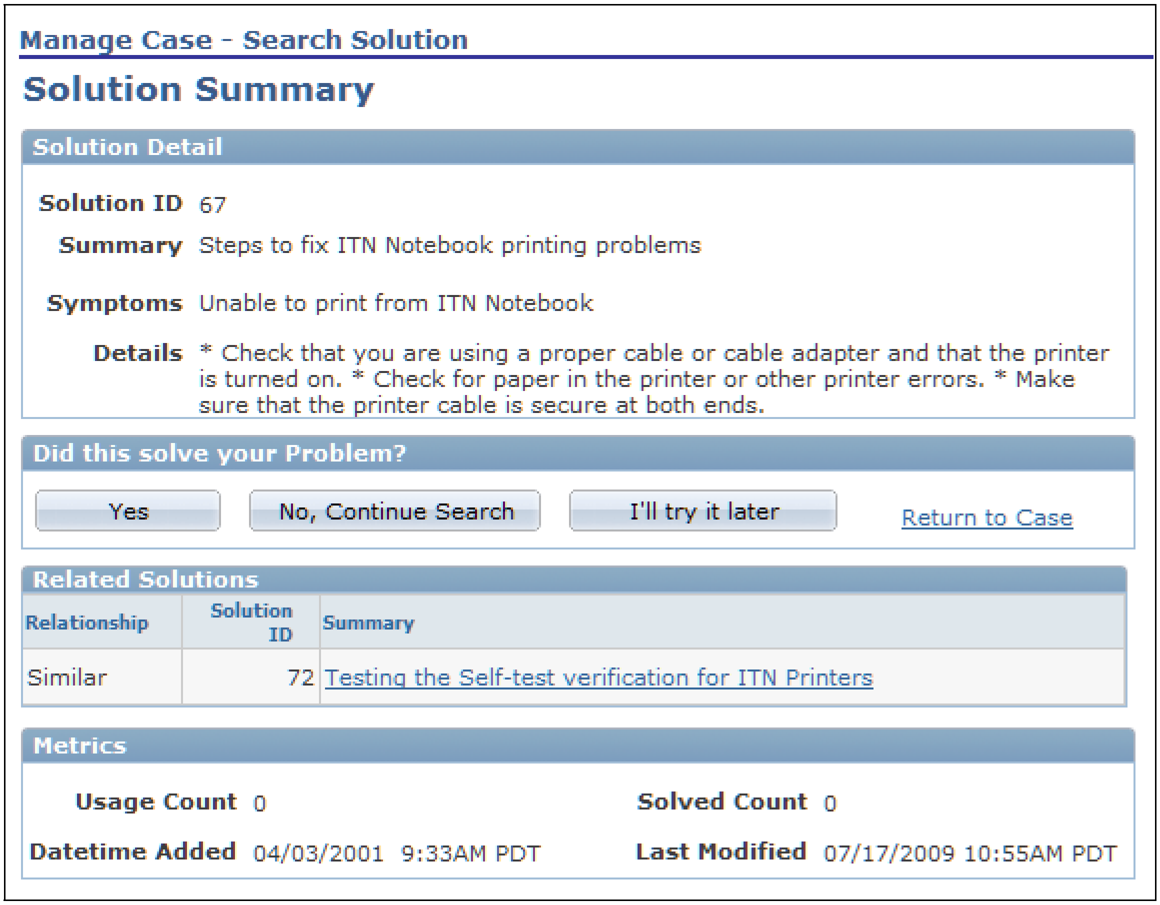
There are more advanced search options available for searching over particular domains. This functionality, however, is reserved for agent-facing cases only.

See Also

PeopleSoft Enterprise CRM 9.1 Services Foundation PeopleBook, "Setting Up Solution Management"

Using the Solution Summary Page

Access the Search Solution - Solution Summary page (on the Keyword Search or Keyword Search - Advanced page, click the summary of a solution in the search results list).



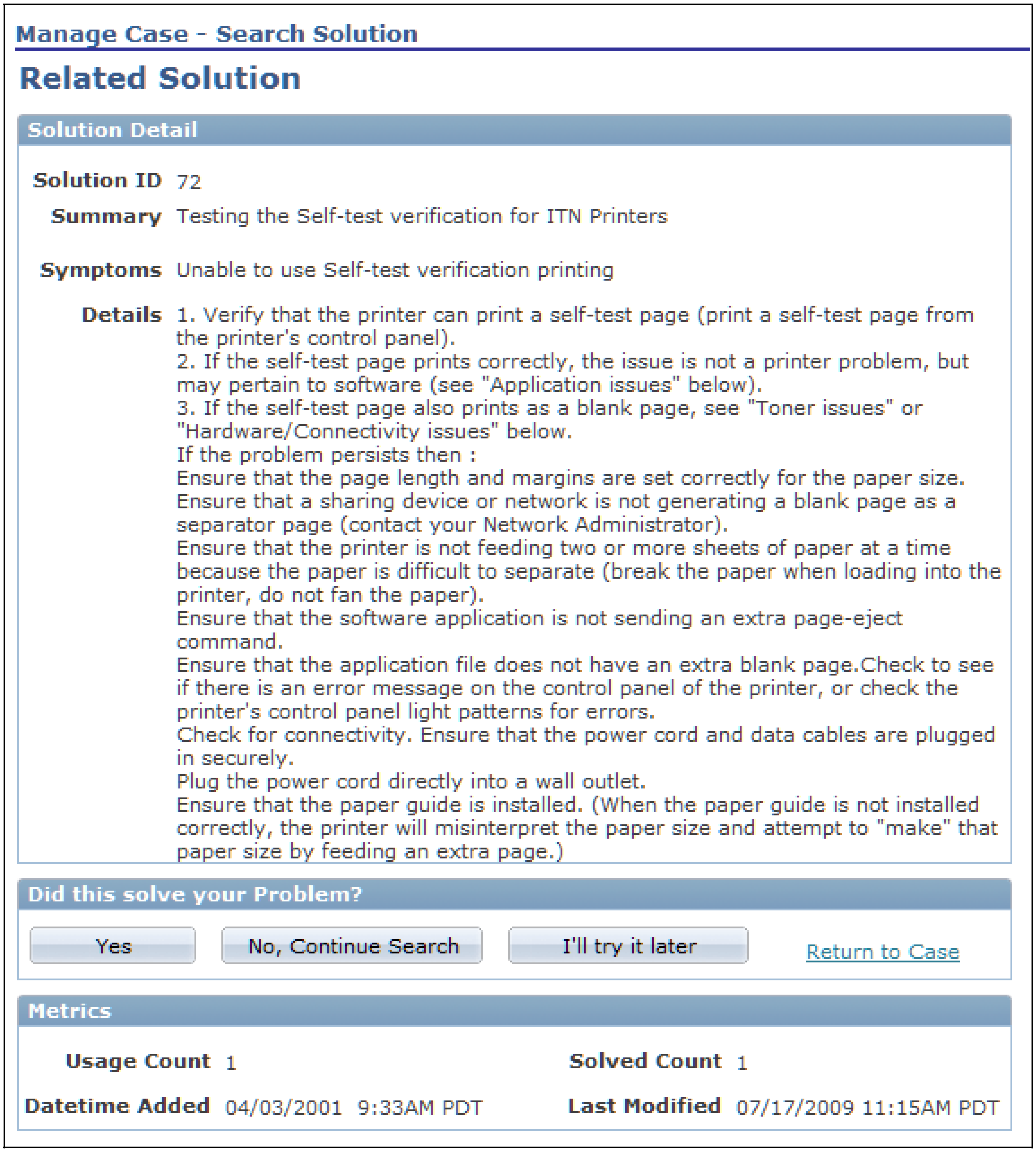
Search Solution - Solution Summary page

Use this page to review the details of a solution and indicate if the solution solved your problem.

If a solution has related solutions, then the system lists the related solutions under Attachments on the Solution Summary Page. By Clicking the Related Solution the user can view the Related Solution Summary.

Using the Related Solution Page

Access the Search Solution - Related Solution page (on the Search Solution - Solution Summary page, click the solution summary in the Related Solutions grid).



Search Solution - Related Solution page

Use this page to locate solutions related to your problem. If the solution solved your problem, click Yes. If you have still not found a solution to your problem, click No, Continue Search.

Accessing FAQs

This section discusses how to:

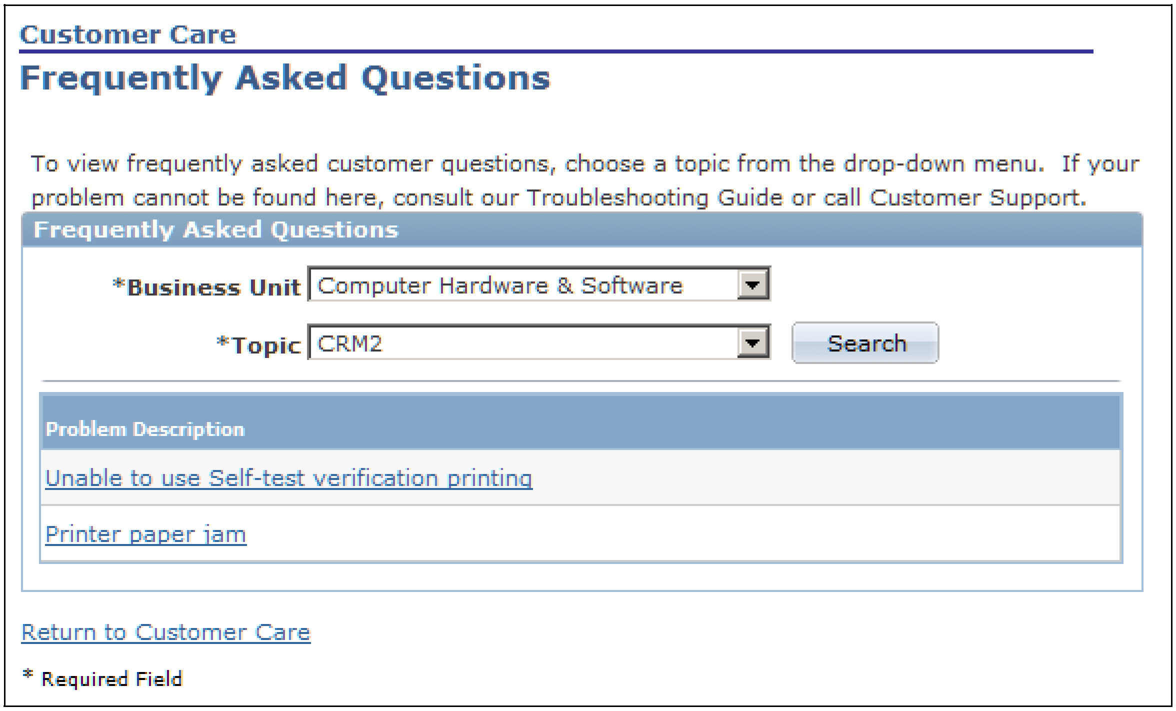
- Select FAQs.
- Review solutions.

Pages Used to Access FAQs

Page Name	Definition Name	Navigation	Usage
Frequently Asked Questions	RBT_FAQ_SOL_SS	• On the Customer Care page, click the Frequently Asked Questions link. • Employee Self-Service, Help Desk, Frequently Asked Questions • Employee Self-Service, HR Help Desk, Frequently Asked Questions • Service Center, Frequently Asked Questions	Select a topic and view a list of frequently asked questions for that topic.
View Solution	RBT_FAQ_PG_SS	Click a problem description on the Frequently Asked Questions page.	Review a solution that is related to an FAQ.

Selecting a FAQ

Access the Frequently Asked Questions page (on the Customer Care page, click the Frequently Asked Questions link).

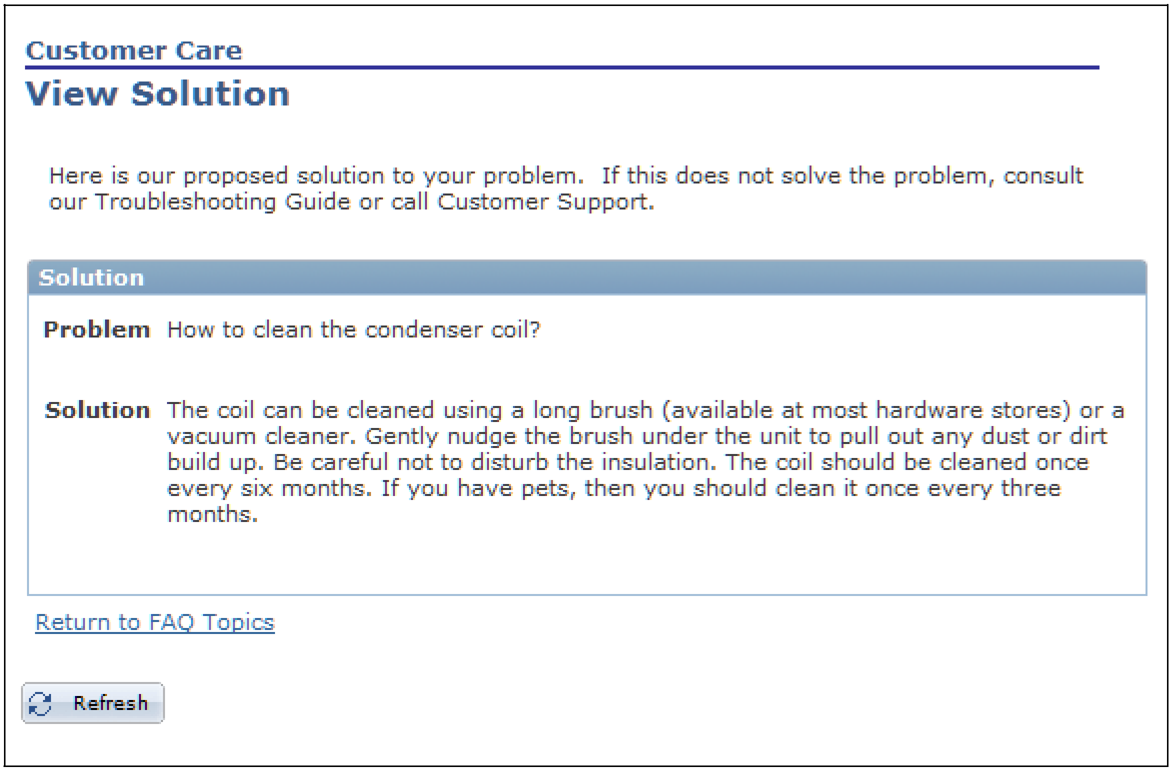


Frequently Asked Questions page

Business Unit	This field may have a different label, depending on how you configure self-service. If you do not show a business unit on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page.
Topic	Select from a list of solution libraries that you set up on the Troubleshooting Guide setup page. Each library is associated with a single script.
Search	Click this button to display a list of solutions in the selected library. The system displays only solutions with a visibility of *All.*
Problem Description	Displays the list of solutions in the selected library. Click a question to access the View Solution page and review information that is related to the question.

Reviewing Solutions

Access the View Solution page (click a problem description on the Frequently Asked Questions page).



View Solution page

After you review the solution, click the Return to FAQ topics to go back to the FAQ page.

Selecting and Running Troubleshooting Guides

This section discusses how to:

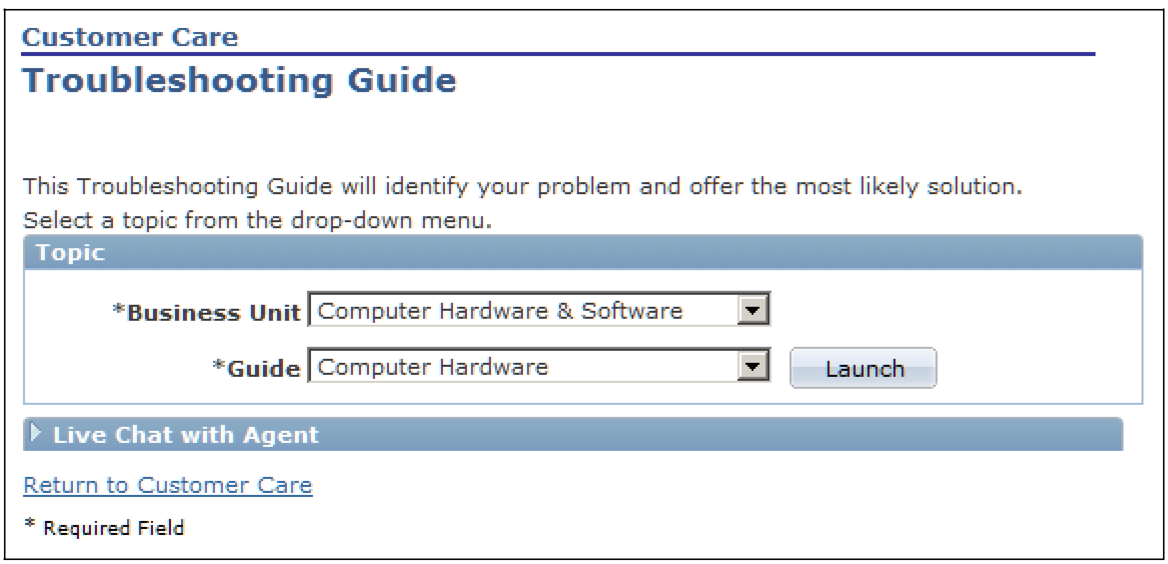
- Use troubleshooting guides.
- Run scripts in self-service.

Pages Used to Select and Run Troubleshooting Guides

Page Name	***Definition Name***	***Navigation***	***Usage***
Troubleshooting Guide	RBT_TGUIDE_SS	• On the Customer Care welcome page, click the Troubleshooting Guide link. • Employee Self-Service, Help Desk, Troubleshooting Guide • Employee Self-Service, HR Help Desk, Troubleshooting Guide • Service Center, Troubleshooting Guide	Select a troubleshooting guide.
Execute Script	RC_BS_SELF_CONFIG	On the Troubleshooting Guide page, select a solution library and click the Search button.	Run a troubleshooting guide script.

Using Troubleshooting Guides

Access the Troubleshooting Guide page (on the Customer Care welcome page, click the Troubleshooting Guide link).



Troubleshooting Guide page

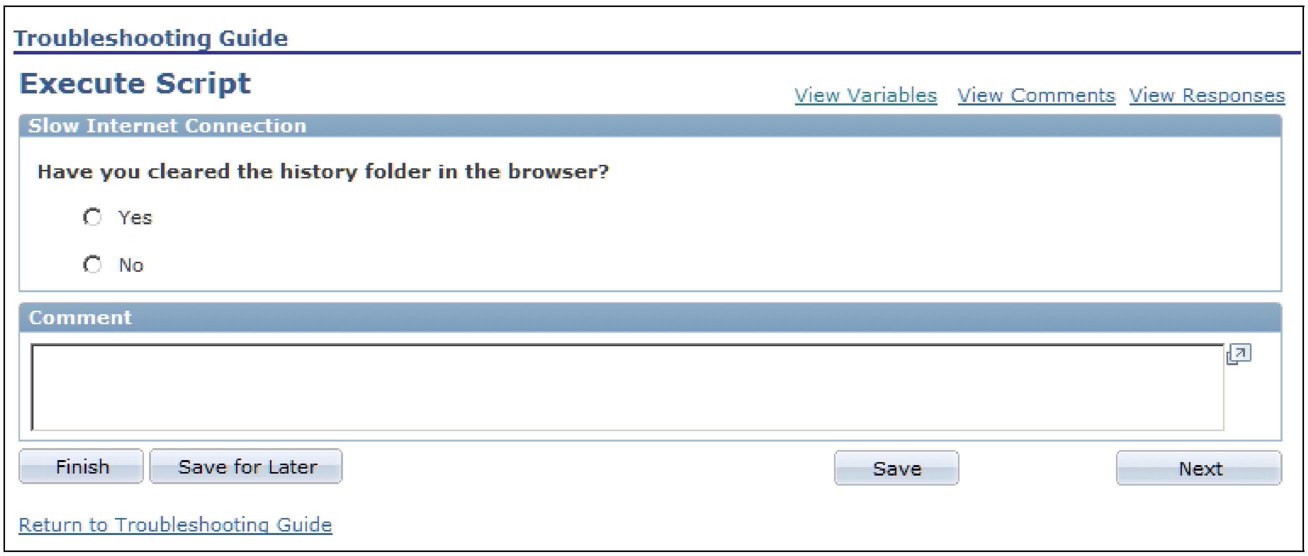
Business Unit This field may have a different label, depending on how you configure self-service. If you do not show a business unit on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page.

Guide Select from a list of solution libraries that you set up in the Troubleshooting Guide setup page. Each library is associated with a single script.

Launch Click to display the Execute Script page and run the script that is associated with the selected library.

Running Scripts in Self-Service

Access the Execute Script page (on the Troubleshooting Guide page, select a guide and click the Launch button).



Execute Script page

For instructions on using the Execute Script page, refer to the Working with Self-Service Application Transactions chapter in this PeopleBook.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Running Scripts," Running Scripts on Self-Service Pages.

Appendix A

Integrating a Case with Third-Party Systems

This appendix provides an overview of the Case Enterprise Integration Point (EIP) and discusses how to:

- Define Case EIP functionality.
- Implement Case EIP.

Understanding the Case EIP

The Case EIP integrates the PeopleSoft CRM case with third-party systems. The Case EIP is developed generically for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, and all PeopleSoft CRM verticals. The Case EIP enables you to:

- Create a case from a third-party system.
- Update a case from a third-party system.
- Request case information from a third-party system.

This is a guide for technical users, installers, system administrators, and programmers who implement, maintain, or develop Case EIP.

Defining Case EIP Functionality

This section discusses:

- Assumptions about the case EIP.
- Case EIP functionality.
- Delivered EIPs.
- Technical process flows.
- Error handling.

Note. Some of the EIPs and business projects described in this section are also available as business processes, or BPEL (Business Process Execution Language), which are described in an appendix in this PeopleBook.

The case web service uses PeopleTools web service and service operation technology, and it has a similar process flow to the case EIP.

See Also

Appendix C, "Delivered Web Service and Service Operations," page 555

Assumptions About the Case EIP

When considering the Case EIP, you must be aware of the following:

- To create a support case, these customer information fields must be provided: Customer BO ID, Customer Role Type ID, Display Template Family CodeID, and Contact BO ID.

  Note. The Display Template Family Code is required for creating a case, not for updating it. If a default Display Template Family Code is specified in the user default setup, the third-party vendor does not have to provide it; case creation will occur. If no business unit or display template is provided in the incoming request message and if the user does not have defaults defined, the system sends an error message back to the third-party vendor.

- The third-party system needs to send the appropriate business unit, vertical, and market values in the request, unless these values can be provided by default from user reference.
- The Case EIP is developed using PeopleTools Integration Broker technology.
- The Case EIP does not use bulk loading.

  The Case EIP feature is intended to automatically create and update cases from third-party systems; it is not for data-conversion purposes.

- The Case EIP and related case component interfaces are meant for the agent-facing case, not for self-service.
- When creating a note for a case using the Case EIP, the system leaves the customer, contact, and employee information blank.

  The Case EIP cannot create a note for a different customer, contact, or employee.

- A case may use attributes.

  An attribute can be of any data type (string, number, date, and so on). The system stores different data types in the matching data type field in the request message. It is the responsibility of the third-party system to provide the correct data format for attributes when creating attributes for a case.

- The case component can be configured to enable or disable functionality and to hide or unhide fields on the Case page.

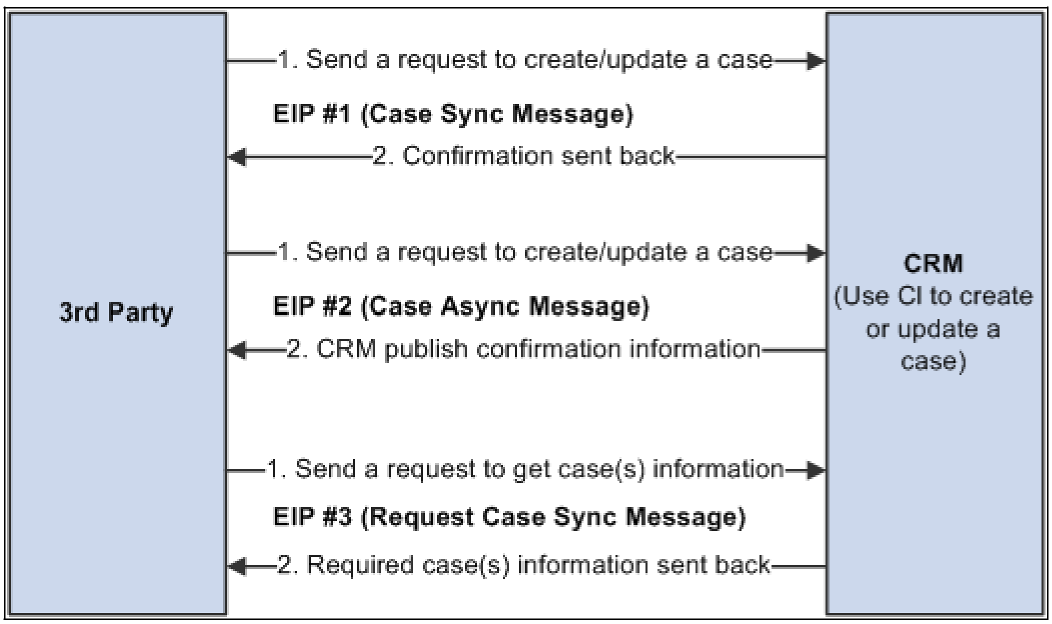
  The case component is rendered based on the display template. When customers send a request to create a case, it is assumed that they will not send information that has been disabled or hidden. The Case EIP will not do additional validation that is based on configuration settings.

  See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates."

Case EIP Functionality

The Case EIP provides a bi-directional EIP in PeopleSoft CRM for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, and all PeopleSoft CRM verticals. It provides a transactional framework that enables your call center to send and receive case information to and from any third-party applications.

This diagram illustrates the Case EIP process flow:



Case EIP process flow

Delivered EIPs

The following EIPs, as shown in the previous diagram, are provided:

- EIP #1 - Case Synchronous EIP.
- EIP #2 - Case Asynchronous EIP.
- EIP #3 - Request Case Information EIP (Synchronous).

Note. If the request contains a case ID, a new case is not created. The existing PeopleSoft CRM case is updated with the pertinent information supplied in the request. If the case ID passed in is invalid, no case is updated and an error message is sent back.

Warning! When you create a case, make sure the value of the CASE_ID field in the request message is empty or *0*. When you update a case, make sure the CASE_ID value is a valid value that exists in the CRM RC_CASE table.

Case Synchronous EIP

The third-party application sends a request to CRM to create or update a case and waits for the response. Once the system processes the case in CRM, confirmation information is sent back to the third-party application.

This EIP has one web service (RC_CASE_REQUEST_SYNC), which contains one service operation (RC_CASE_REQUEST_SYNC) with two messages:

- RC_CASE_REQUEST_SYNC - Inbound synchronous request message.
- RC_CASE_RESPONSE_SYNC - Outbound synchronous response message.

The processing details are as follows: when a request message is received, the on request event calls an appropriate case component interface (CI) to process information from the request message and saves the information into the Case component. The system sends a response message back to the third-party system with confirmation information. The response message may contain information that CRM populates, such as case ID, assigned provider group, and agent.

Since the third-party system is waiting for the response from CRM, the system processes only one case per message.

Case Asynchronous EIP

The third-party system sends a request to create or update a case, and it is not waiting for the response. Once the case is created or updated, CRM publishes confirmation information back to the third-party.

This EIP has two web services:

- RC_CASE_REQUEST_ASYNC, which contains one service operation (RC_CASE_REQUEST_ASYNC) with the message RC_CASE_REQUEST_ASYNC (inbound asynchronous message).
- RC_CASE_RESPONSE_ASYNC - which contains one service operation (RC_CASE_RESPONSE_ASYNC) with the message RC_CASE_RESPONSE_ASYNC (outbound asynchronous message).

The processing details are as follows: when CRM receives the request, it calls the appropriate case CI to create or update a case and then publishes case information back to the third party.

Since the third-party system is not waiting for the response from CRM, the request message may include information from multiple cases in one message. CRM processes them one by one. The system issues a commit at the end of each successful case.

Request Case Information EIP (Synchronous)

The third-party system sends a request to CRM to find case information. The request may contain multiple cases. CRM processes the request and sends the information for the case or cases back to the third-party system.

This EIP has one web service (RC_CASE_INQUIRY_REQ_SYNC), which contains one service operation (RC_CASE_INQUIRY_REQ_SYNC) with two messages:

- RC_CASE_INQUIRY_REQ_SYNC - Inbound synchronous request message.
- RC_CASE_INQUIRY_RESP_SYNC - Outbound synchronous response message.

The processing details are as follows: the request message may have one or more Case IDs, the on request event is triggered, and the CRM system processes the rowset of the message to populate case information, one by one. The system uses a direct SQL query instead of a CI.

Technical Process Flows

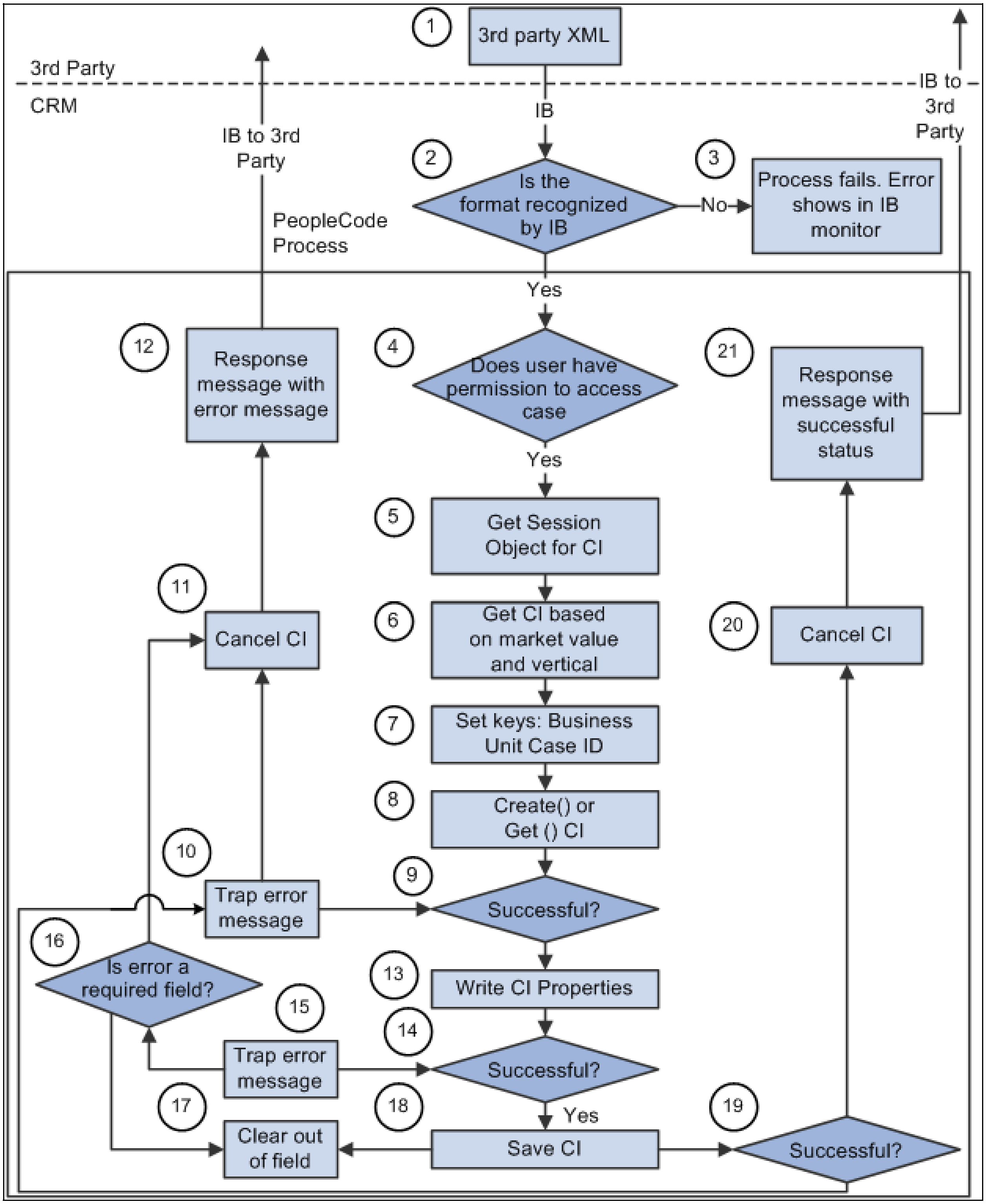
The logic of EIP #1 (Case Synchronous EIP) and #2 (Case Asynchronous EIP) are the same except for the way in which they are initiated.

EIP #1 is triggered from an OnRequest event. The system generates a sync response message and returns it to the third-party system.

EIP #2 is triggered from an OnNotify event. The system publishes a response message for the third-party application.

EIP #1 and #2 share the same PeopleCode function, ProcessCaseEIP is defined in the FUNCLIB_RC_EIP.CASE_EIP field formula.

The following diagram illustrates the technical process flow for both EIP #1 and EIP #2:



Process flow for EIP #1 and EIP #2

This list indicates where you are in the process flow diagram:

1. The third-party sends an XML request to CRM by way of the integration gateway by using a web service.

3. If integration broker (IB) does not recognize the format, the message is trapped in integration broker.

The process fails (this is standard integration broker functionality).

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker.*

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration.*

4. OPRID, which is required, is used to validate whether the user has access to the requested case.

Once the user passes security checking, the system creates a case or updates it through integration broker. The integration broker user ID is used to create or update a case. This is the user ID that is used to start the application server.

5. If the user passes the security check, the system obtains a session for component interface processing.

6. When creating a case, BUSINESS_UNIT is required.

The system automatically assigns the next new CASE_ID. If BUSINESS_UNIT is not supplied when creating a case, CRM uses the default business unit from user preferences. When updating a case, only CASE_ID is required since it is a unique identifier.

7. Based on the Case ID value, the system decides whether to insert or update a case.

When no Case ID is provided, CRM creates a case by calling the *create()* method of CI. When the Case ID is provided, CRM checks whether the Case ID exists in CRM. If it exists, the case is updated by calling the *get()* method; otherwise, the system does not do any case processing. The system generates a response message with CASE_EIP_STATUS = 1 (failed) and CASE_EIP_ERROR_MSG - *Update failed. Case 123 does not exist in CRM.* PeopleCode function *IsCaseExist* in FUNCLIB_RC_EIP. The CASE_ID FieldFormula checks if the case exists.

8. If the create() or get() method fails, the system generates an error message in RC_CASE_EIP_ERR for the response message.

The system cancels the CI to reset the instance (process 11), and sends the response message with the error message back to the third-party (process 12).

9. Once the create() or get() method passes successfully, CRM sets the CI properties as supplied in the request message.

When the third-party application sends a request to create a support case or a Higher Education case for a company contact or consumer, CRM requires customer and contact information.

For customer information, the third-party application can either provide CUST_ID or BO_ID_CUST.

If BO_ID_CUST is provided, CRM uses it directly to create a case.

Conversely, if only CUST_ID is provided, CRM uses the RD_COMPANY table to derive BO_ID_CUST in order to create a case.

The function to get BO_ID_CUST is based on CUST_ID is the PeopleCode Function *GetCustBObyID* in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

For contact information, the third-party application can either provide the PERSON_ID or BO_ID_CONTACT.

When BO_ID_CONTACT is provided, CRM uses it directly; otherwise, contact PERSON_ID is used to derive BO_ID_CONTACT from the RD_PERSON table.

The function to get BO_ID_CONTACT is based on PERSON_ID, the PeopleCode Function *GetPersonBObyID* in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

Considerations for HelpDesk or HelpDesk for Human Resources Cases, or for Service Center for Higher Education Case for Worker

The third-party application must provide employee information when it sends a request to create a help desk case. To create a case, the third-party application must also supply the EMPLID, as CRM uses it to derive appropriate BO_ID_CUST with ROLE_TYPE_ID_CUST.

BO_ID_CUST and ROLE_TYPE_ID_CUST need to be populated internally for a case.

Note. Tip: When creating a support case for a customer, make sure BO_ID_CUST (or CUST_ID), ROLE_TYPE_ID_CUST, BO_ID_CONTACT (or CONTACT_PERSON_ID), ROLE_TYPE_ID_CNTCT is provided. When creating a HelpDesk case for an employee, make sure the EMPLID is provided. The POI (person of interest) is supported for PeopleSoft HelpDesk for Human Resources cases only. Third-party vendors must pass a valid worker for creating an IT help desk case, and a valid worker or POI for creating a HelpDesk for Human Resources case. Higher Education cases support company contact, consumer, and worker. When creating a Higher Education case, provide either customer or employee information based on what type of case you want to create.

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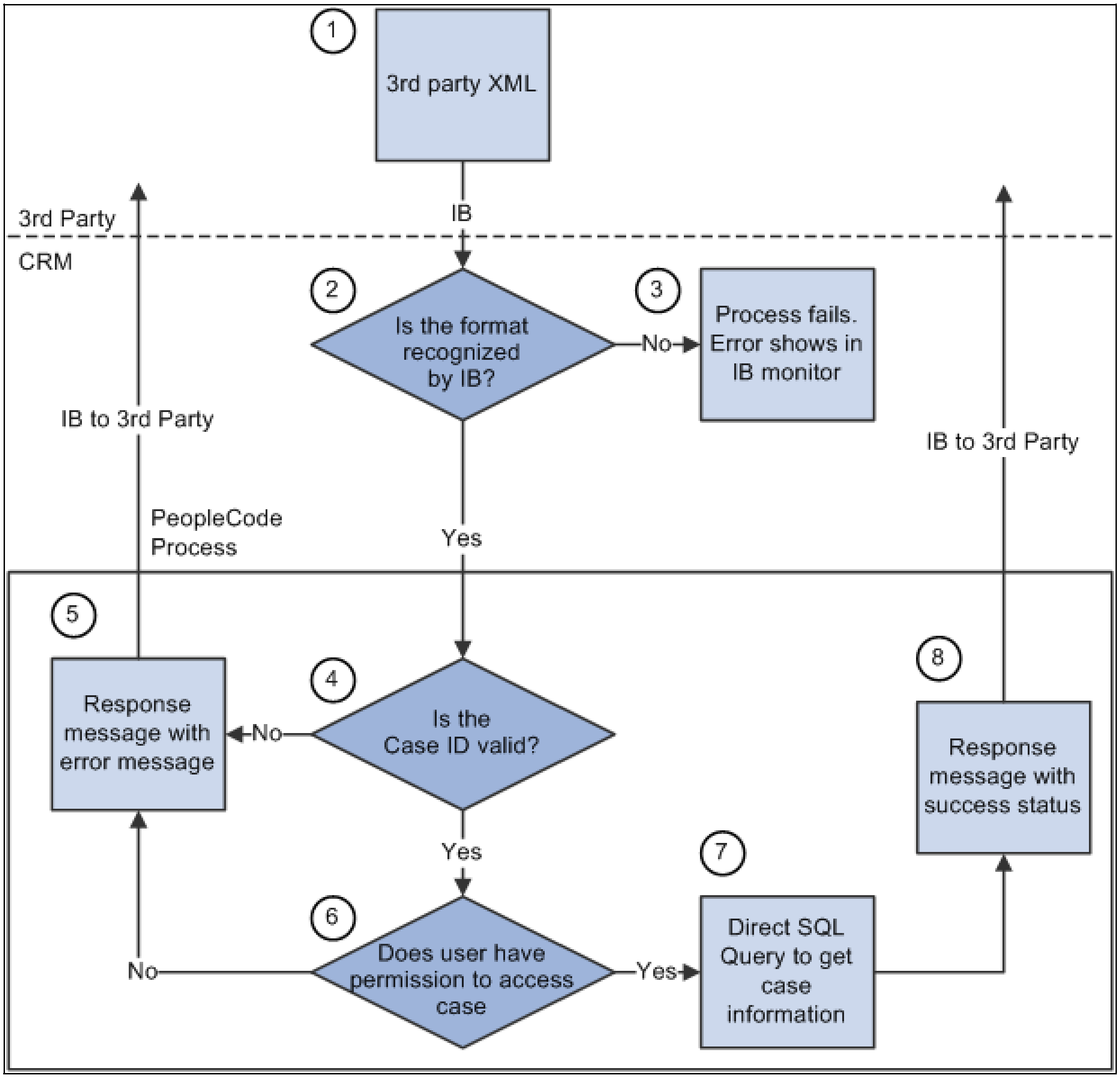
15. If the setting of a CI property for a field fails, the system traps an error message in the &PSMessage object with information on which field caused the error.

The following diagram illustrates the technical process flow for EIP #3:



Process flow for EIP #3

1. The third-party application sends an XML request to CRM by way of the integration gateway.

2. If the integration broker (IB) does not recognize the format, the request is trapped in integration broker.

The case process fails.

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker.*

See *Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration.*

3. When a message is passed in from integration broker, the PeopleCode process begins.

The system checks if the case ID exists in PeopleSoft CRM. If the case does not exist in PeopleSoft CRM, the system sends back a response message with an error message (process 5).

4. If the case exists in CRM, PeopleSoft CRM checks if the user has access to the case component based on the market and vertical, and the system gathers market and vertical information.

If a user does not have access, a response message is sent back immediately with the access denied error message (process 5).

The function to check access permission is:

IsUserAuthorized in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

5. Once the user passes the security check, the system executes a direct SQL query to get all case related information and send it back to the third party (process 8).

Error Handling

When a required field contains an invalid value in a request message, or the save event fails, the process fails. The system copies the request message over to response message, and the response message is sent back to the third party with an error message.

When a non-required field contains an invalid value, the system ignores that field and case processing continues. The system sends back a warning message.

Here are some tips:

- Always check fields CASE_EIP_STATUS and CASE_EIP_GEN_MSG first in the response message.

  When the status is 0 or 2, the response message contains case information that is stored in the PeopleSoft CRM system. When the status is 1 (that is, when the case has failed), nothing is saved in PeopleSoft CRM, and the response message contains a copy of the request information, not the case information stored in CRM. This functionality aids in error handling.

- When CASE_EIP_STATUS fails or a warning is issued, the system logs a detailed error or warning message in the rowset RC_CASE_EIP_ERR of the response message.

Implementing Case EIP

This section discusses:

- Code processing for Case EIP.
- Setup configuration.
- Case EIP setup.

Code Processing for Case EIP

For Case EIP #1 (Case Synchronous Message), the entry point is in the service operation RC_CASE_REQUEST_SYNC OnRequest handler. It calls ProcessCaseEIP function in FUNCLIB_RC_EIP.CASE_EIP FieldFormula.

For Case EIP #2 (Case Asynchronous Message), the entry point is in service operation RC_CASE_REQUEST_ASYNC, onNotify handler. It calls the same ProcessCaseEIP function as EIP #1.

For Case EIP #3 (Request Case Synchronous Message), the entry point is in service operation RC_CASE_INQUIRY_REQ_SYNC OnRequest handler. It calls ProcessCaseInquiry function in FUNCLIB_RC_EIP.CASE_EIP FieldFormula.

Setup Configuration

The two setup options for case EIP are:

- Number of notes for a case.
- Default value for Source EIP.

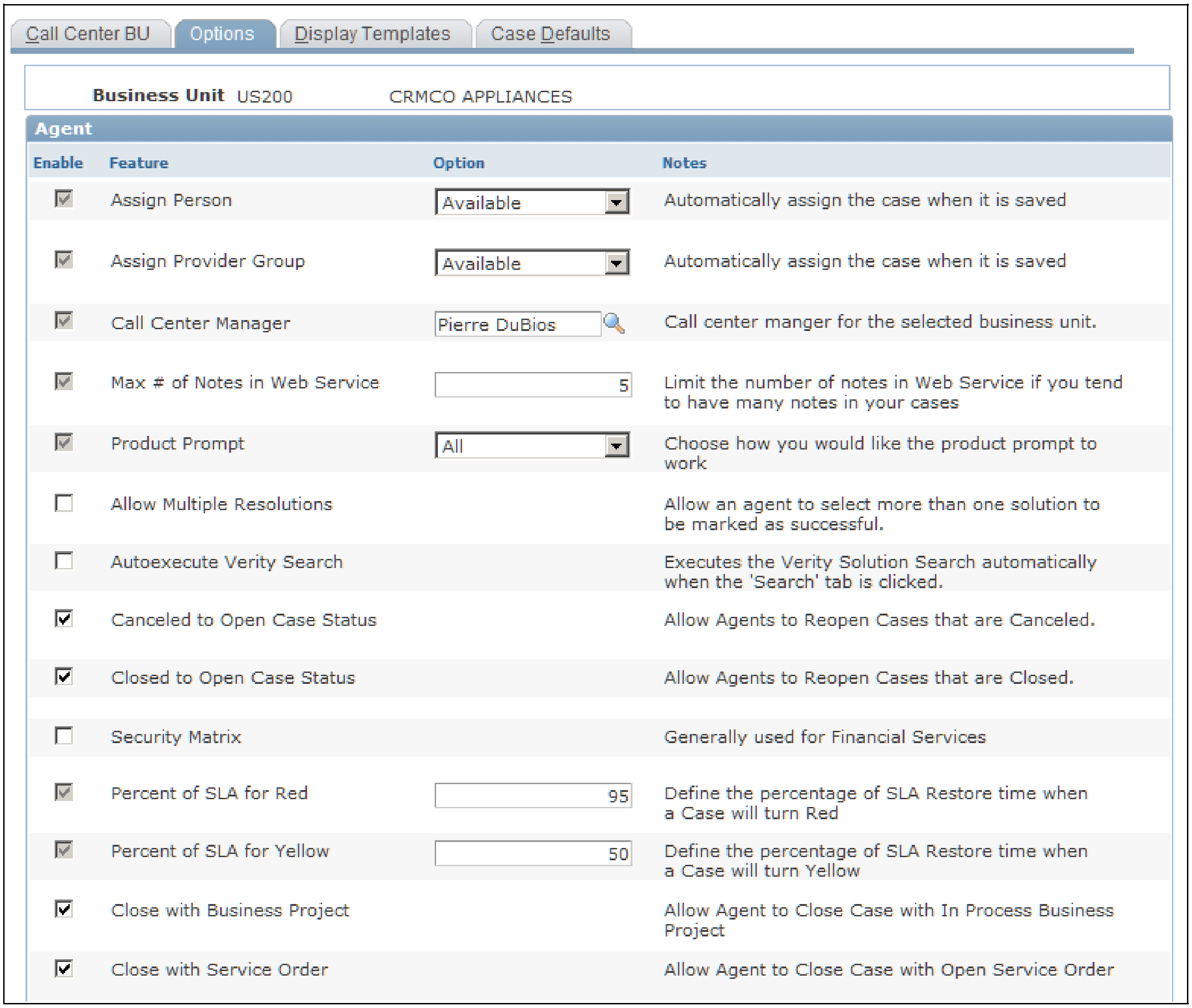
Number of Notes for a Case

The Max # of Notes in Web Service field indicates the maximum number of notes to return in the request EIP. The case component can contain an unlimited number of notes. This setup affects Case EIP performance when trying to process hundreds or thousands of notes for a case. Based on your business requirements, you can set the upper limit number for Case EIP.

Note. This setting is only applied to response messages. Request messages process all notes that a third party sends.

For instance, the customer sets the default number of notes for the response message at five. When the request message contains more then five notes, the system processes all the notes that are saved into the case. When a case contains more than five notes and a third party is requiring case information, then the system returns only the five most recent notes in the response message.

This page shows the Max # of Notes in Web Service field on the Call Center Definition - Options page:

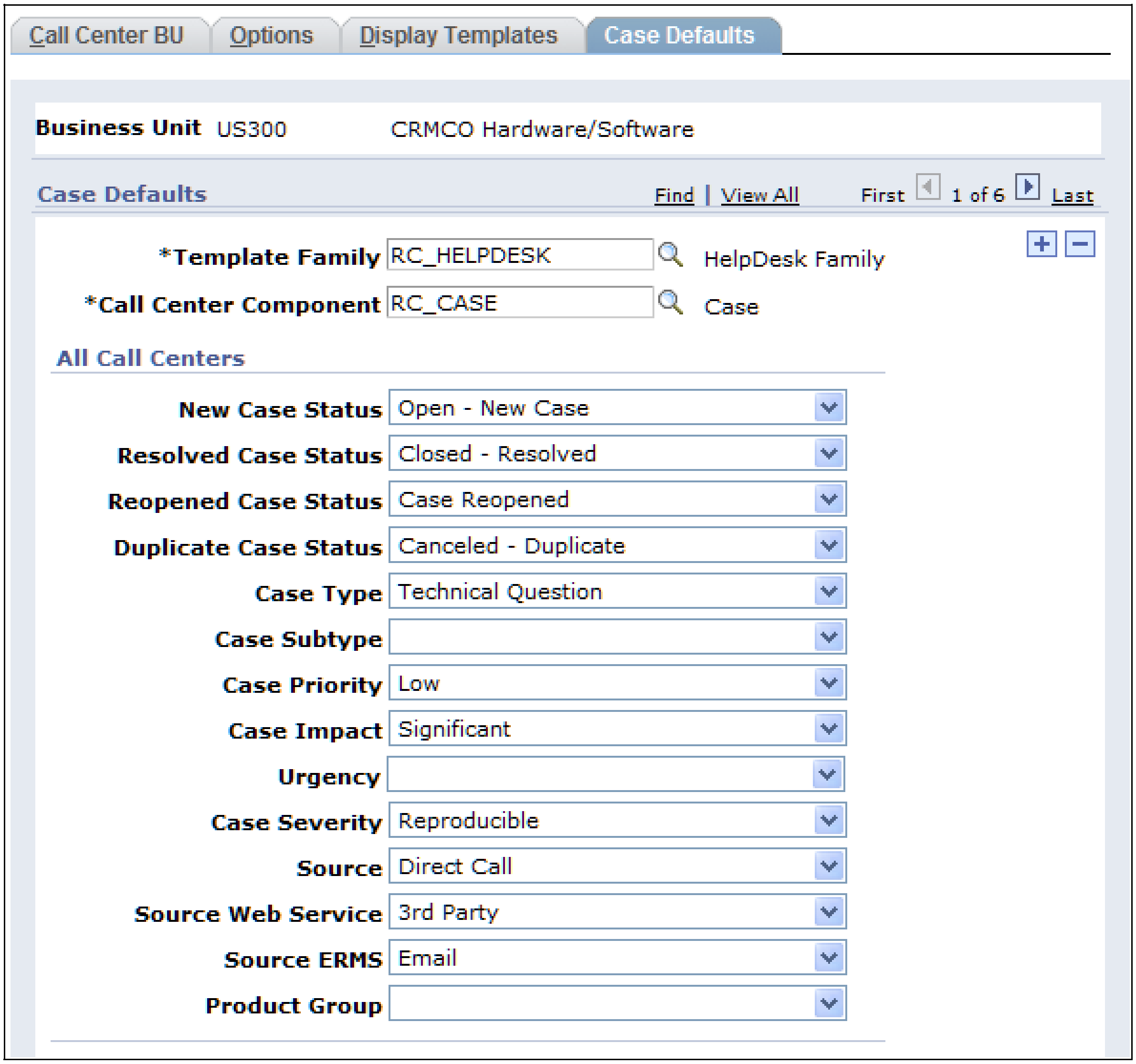


Call Center Definition - Options page

Default Value for Source Web Service

A customer can define the source value to use when creating a case using the Case EIP. It can be a different source value from the cases that are created online.

This example shows the Case Defaults page:



Case Defaults page

Note. The source EIP web service options are driven by business unit.

Case EIP Setup

Activate these service operations along with their handlers and routings:

- RC_CASE_REQUEST_SYNC
- RC_CASE_REQUEST_ASYNC
- RC_CASE_RESPONSE_ASYNC
- RC_CASE_INQUIRY_REQ_SYNC

As delivered, PeopleSoft service operations are inactive. In both your PeopleSoft CRM and your third-party application, you must:

- Activate the required application service operations.
- Activate the service operation handler and routing.
- Set the associated message queue to run mode for asynchronous service operations.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Testing Utilities and Tools

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker

Enterprise PeopleTools 8.50 PeopleBook: Integration Broker Administration

Appendix B

PeopleSoft Call Center Interactive Reports

This chapter provides an overview of interactive reports and discusses how to launch and view interactive reports for PeopleSoft Support and HelpDesk.

Understanding Interactive Reports

PeopleSoft call center interactive reports are implementations of PeopleTools Analytic Calculation Engine (ACE). Interactive reports are dynamic and they provide analytic information to users. You can move data elements around on a report and view it using different dimensions. The ability to view reports at different angles, gives you visibility into the health of your call center, including the ability to:

- Detect trends that can be utilized for proactive problem management.
- Evaluate team and agent performance metrics.
- Anticipate training and staffing requirements.

You can save interactive reports, export them to Microsoft Excel, or print them as hard copies. While interactive reports are interactive, the communication between them and the CRM database is one-way, which means the changes you make on the reports do not affect the data in the database. From interactive reports, you are not allowed to transfer to any CRM components and access data. User roles control access to interactive reports.

Note. You must have Internet Explorer 5.1 or higher to access these reports.

Launching and Working with Interactive Reports

Interactive reports use action types and workflow to capture response and restore times. If the action types defined for the response are not met, an Application Engine process updates the case with response and restore exceptions.

When you launch an interactive report, the system displays a view of the data that the system has captured. These views are built using PeopleTools Analytic Calculation Engine (ACE) technology.

Common Elements Used in this Chapter

Run Control ID	Select from the list of run control IDs. These IDs identify a set of saved report parameters from previous launches and enable you to save time and reduce mistakes. Use the Add New Run Control tab to generate reports when you don't have a run with the desired business unit, customer, or date range.
Business Unit	Select the business unit for which you want to launch the interactive report. This is a required field.
All Customers	Select to launch the interactive report for all customers within the selected business unit.
Select Customer and **Customer**	Select to launch the interactive report for an individual customer and then select a customer from the Customer field.
Start Date	Select the first date from which you want to view data for the interactive report. This is a required field.
End Date	Select the last date from which you want to view data for the interactive report. This is a required field.
Launch Interactive Report	Click to launch the Interactive Report. The system opens a separate window to display the data.

Launching and Viewing Interactive Reports

This section discusses how to:

- Launch and view the Service Operations Analysis report.
- Launch and view the Support Service Level Management Analysis report.
- Launch and view the Help Desk Service Level Management Analysis report.
- Launch and view the Change Metrics report.
- Launch and view the Forward Schedule report.

See Also

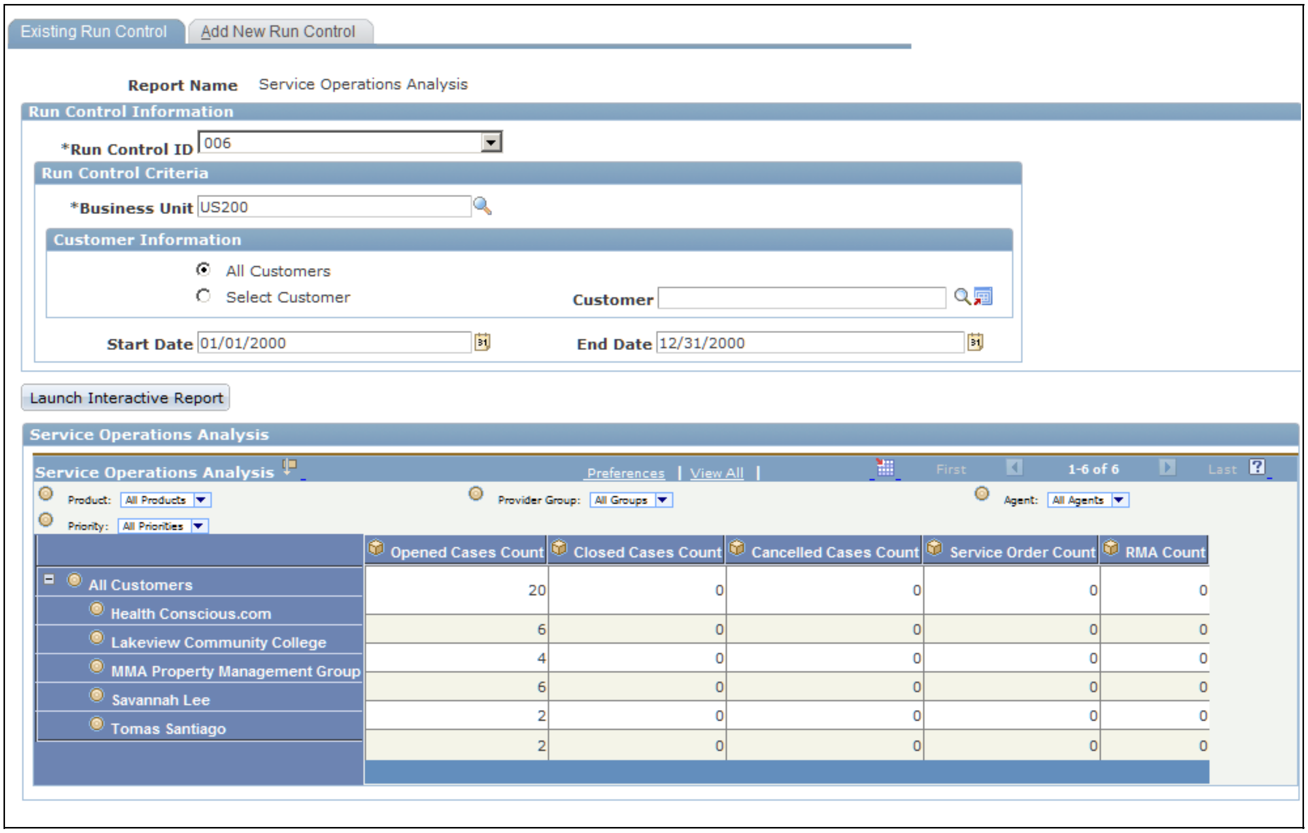
PeopleSoft Enterprise Components for CRM 9.1 PeopleBook, "Using Interactive Reports"

Pages Used to Launch and View Interactive Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Service Operations Analysis	RC_SUP_MUPD	Support, Interactive Reports, Service Operation Analysis	Launch the PeopleSoft Support Service Operations Analysis report.
Support Service Level Management Analysis	RC_SUP_SUPD	Support, Interactive Reports, Service Level Management	Launch the PeopleSoft Support Service Level Management Analysis report.
Help Desk Service Level Management Analysis	RC_HD_SUPD	HelpDesk, Interactive Reports, Service Level Management	Launch the PeopleSoft Help Desk Service Level Management Analysis report.
Change Metrics Update	RG_CHG_METRIX_UPD	HelpDesk, Interactive Reports, Change Request Metrics	Launch the PeopleSoft HelpDesk Change Metrics report.
Forward Schedule	RG_FWD_SCHED_UPD	HelpDesk, Interactive Reports, Forward Schedule of Changes	Launch the PeopleSoft HelpDesk Forward Schedule report. **Note.** This report captures change requests that are in the statuses of *Approved* and *Executing.* The reports should also have start and end dates populated on the requests. You must set the run control dates to encompass the start dates of the change requests in the above statuses. In other words, if you want to know how many requests are approved or executing and scheduled for the month of May, enter run control start dates of 5/1/2006 and 5/31/2006.

Launching and Viewing the Service Operations Analysis Report

Access the Service Operations Analysis launch page (Support, Interactive Reports, Service Operation Analysis).

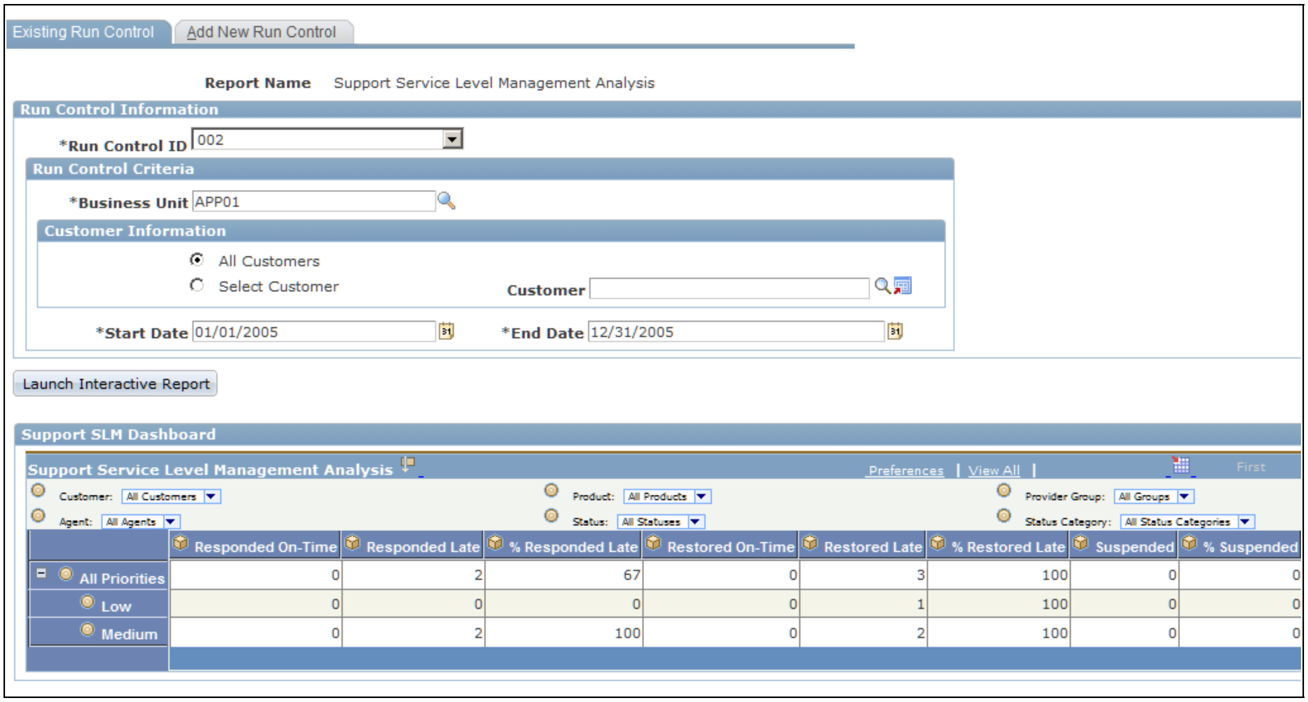


Service Operations Analysis launch page

Use this report to track the number of cases opened, cases closed, cancelled cases, and service orders

Launching and Viewing the Support Service Level Management Analysis Report

Access the Support Service Level Management Analysis launch page (Support, Interactive Reports, Service Level Management).

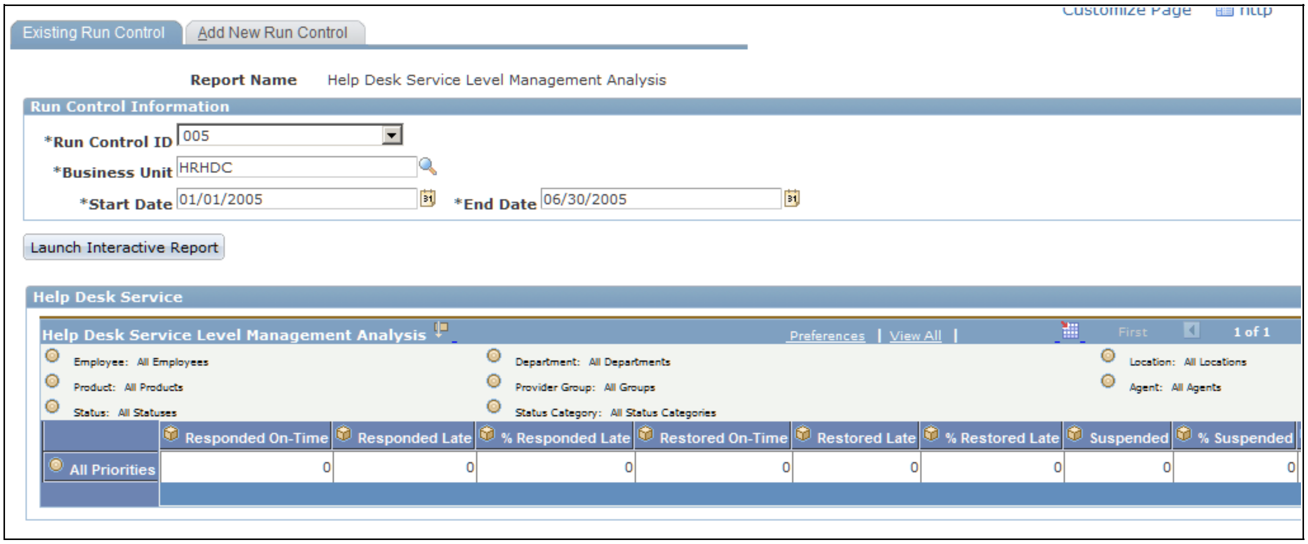


Support Service Level Management Analysis launch page

Use this report to track the total number of cases in which the support agent or agents responded on time, responded late, restored service on time, restored service late, or suspended cases.

Launching and Viewing the Help Desk Service Level Management Analysis Report

Access the Help Desk Service Level Management Analysis launch page (HelpDesk, Interactive Reports, Service Level Management).

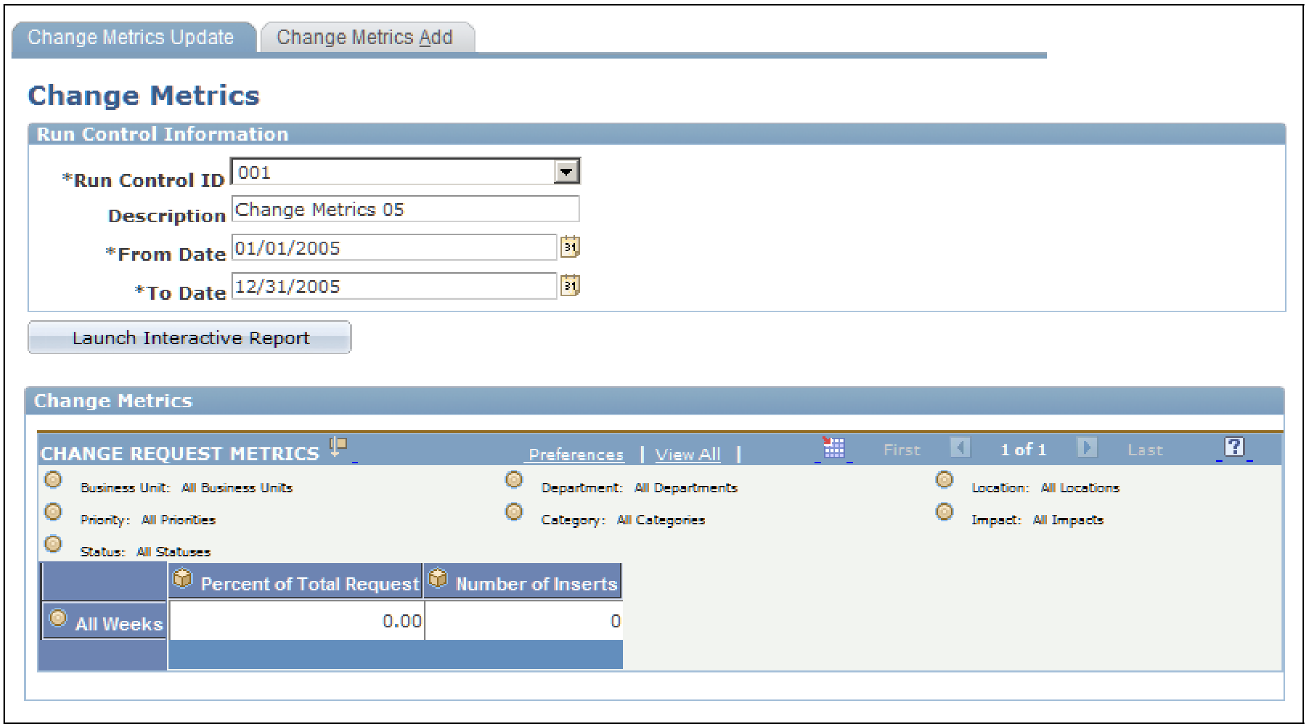


Help Desk Service Level Management Analysis launch page

Use this report to track the total number of cases in which the help desk agent or agents responded on time, responded late, restored service on time, restored service late, or suspended cases.

Launching and Viewing the Change Metrics Report

Access the Change Metrics Update launch page (HelpDesk, Interactive Reports, Change Request Metrics).

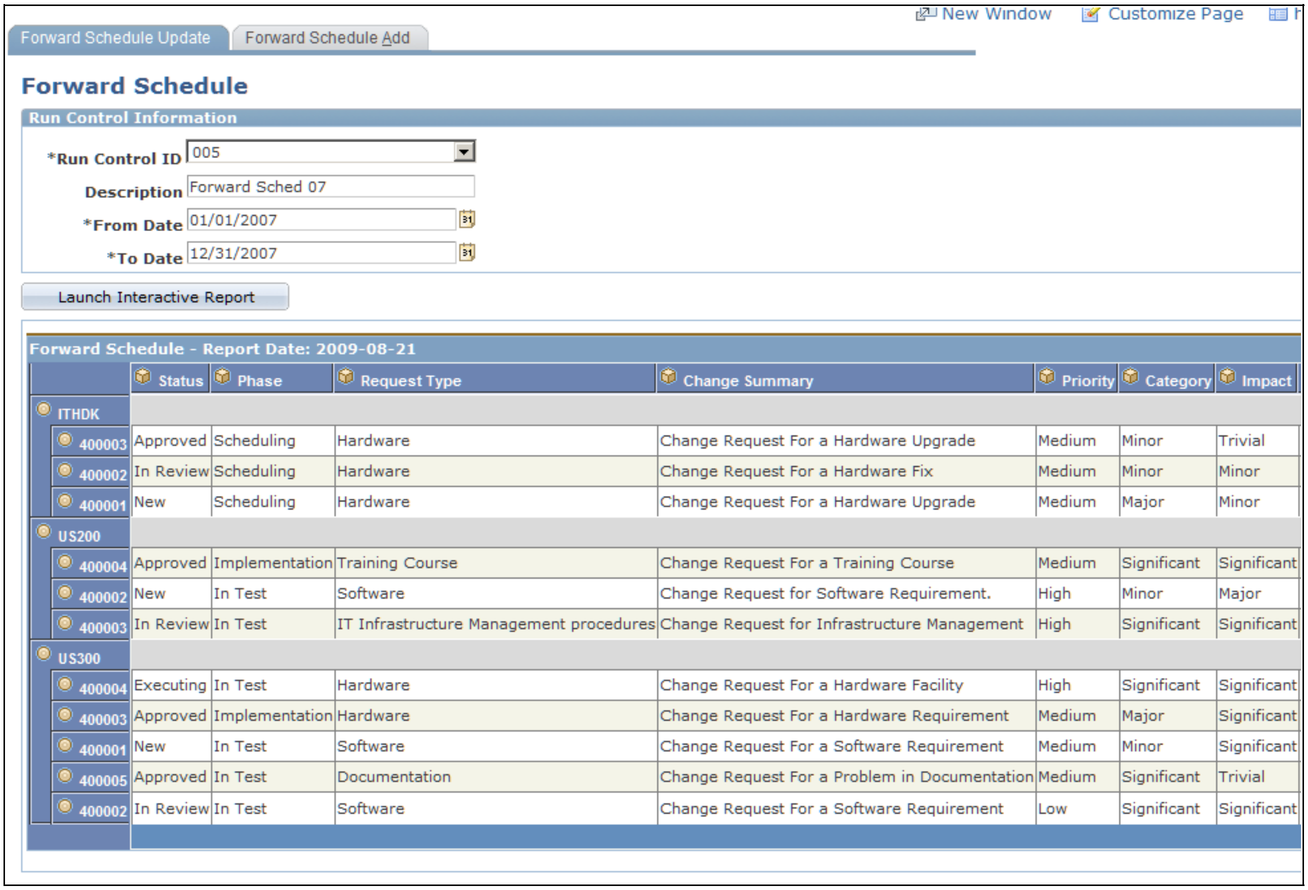


Change Metrics Update launch page

Use this report to track the number of requests opened.

Launching and Viewing the Forward Schedule Report

Access the Forward Schedule Update launch page (HelpDesk, Interactive Reports, Forward Schedule of Changes).



Forward Schedule Update launch page

Use this report to view a forward schedule of changes.

The analytic grid will list all change requests having the start and end date within the requested *From Date* and *To Date.* The full list of fields in the report is as follows:

- Business Unit
- Change ID
- Status
- Phase
- Request Type
- Change Summary
- Priority
- Category
- Impact
- Start Date and Time
- End Date and Time

- Production Release Date
- Outage Required
- Requester
- Interested Parties
- Owner

Appendix C

Delivered Web Service and Service Operations

This appendix discusses the delivered Case web service and service operations for the Case component.

Delivered Web Services

This section discusses:

- Case web services.
- How to view the Case message elements.

See Appendix A, "Integrating a Case with Third-Party Systems," page 531.

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Business Processes and Web Services"

Case Web Services

PeopleSoft CRM delivers these service operations for the Case web service:

- Create Case

  The user sends specific user information together with case information through a request message. User information is handled in the security section as part of request message. The return message includes the case ID when the operation is successful. If the message fails, the system displays an error message. If there is any warning message, such as non-required fields are invalid, the system still creates the case and sends a warning message back in a return message

- Update Case

  The user sends specific user information, including the Case ID and other case-related information, through a request message. The security is handled in the security section. The return message includes the case ID when the operation is successful. If the message fails, the system displays an error message. Warning message are displayed in the return message. The system updates the case and ignores the warning messages.

- Get Case

  This operation requires a case ID. The return message includes case information.

- Search Case

  After a user sends specific search criteria information through a request message, this operation returns a list of cases that meet all the given criteria.

Note. The system checks the user ID to see if the user has access to secured case information for the create, update, and get case operations.

This table provides the technical names, operation type, and messages names of the service operations that are related to the Case web service RC_CASE:

Service Operation	***Operation Type***	***Request Message***	***Response Message***
Create Case (RC_CASE_CREATE)	Synchronous	RC_CASE_CREATE_REQ	RC_CASE_CREATE_RES
Get Case (RC_CASE_GET)	Synchronous	RC_CASE_GET_REQ	RC_CASE_GET_RES
Search Case (RC_CASE_SEARCH)	Synchronous	RC_CASE_SEARCH_REQ	RC_CASE_SEARCH_RES
Update Case (RC_CASE_UPDATE)	Synchronous	RC_CASE_UPDATE_REQ	RC_CASE_UPDATE_RES

Viewing the Case Message Elements

You can view the request and response messages that are included in each Case service operation through PeopleTools.

To view a list of field names and aliases for the RC_CASE-related messages:

1. Select PeopleTools, Integration Broker, Integration Setup, Services.
2. Enter *RC_CASE* in the Service field and click Search.

   From the result list, select the service RC_CASE.
3. Within the service definition's Existing Operations grid, select the service operation you want to view.
4. Within the service operation definition, select View Message link for the message you want to view.

   The system opens a new browser window to display the Message Definition page.
5. Within the message definition, click the desired message name link in the Parts grid.

   The system opens a new browser window to display the message part.

6. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

Appendix D

Integrating Oracle's Enterprise Manager with PeopleSoft CRM HelpDesk

Oracle's Enterprise Management (EM) system is now integrated with PeopleSoft CRM to let help desk cases be automatically generated from alerts initiated from the EM system. This integration requires certain files to be deployed and configured on the EM system, as well as certain PeopleSoft CRM settings as described in this appendix.

This appendix addresses the following topics:

- Understanding Oracle's EM System Integration with PeopleSoft CRM.
- Setting up Options in PeopleSoft CRM.
- Deploying and Configuring the PeopleSoft Connector to the EM Console.

Understanding Oracle's EM System Integration with PeopleSoft CRM

This section discusses:

- How it works.
- Integration flow process.
- Connector descriptor.
- Trouble ticket template.
- Sample case created from EM.

How it works

Enterprise Manager (EM) is Oracle's integrated solution for administering and monitoring software and systems. It provides Application Performance Management, distributed database and application server administration, and automated tuning of Oracle environments.

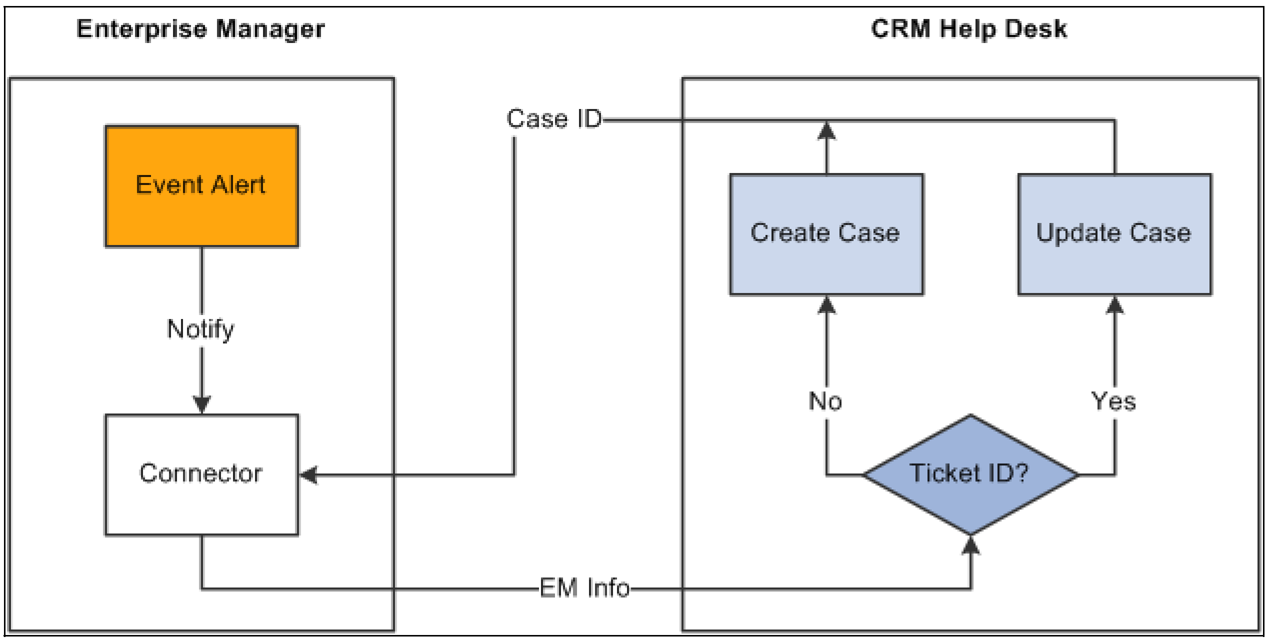
Oracle's EM utilizes a notification system that enables users to set up event rules which generate notifications (for example you may want the system to issue an alert when disk space is 99% full). When such an event occurs, the system can create a case within Oracle's PeopleSoft HelpDesk application, which can assign a worker to take action to resolve the case.

Through the notification system, PeopleSoft Case Connector (trouble ticketing system connector) integrates with Oracle's Enterprise Manager. When the system triggers a rule, the connector is notified and a case is created or updated based on a trouble ticket template. The system then sends a response message with the case ID (ticket ID) back to Enterprise Manager.

Once the case is created, a help desk user can drill into the details on the EM Alert page from the case. In addition, an EM user can drill back to the case from the EM Detail page.

Integration flow process

This illustration shows the integration between PeopleSoft's CRM HelpDesk application and Oracle's EM system. When a defined rule in EM is triggered, the connector is notified to create or update a case. The case ID is then sent back to the EM system.



Integration Flow

Connector Descriptor

The connector descriptor describes how the EM system communicates with the CRM case trouble ticketing system. The connector descriptor is an XML based file that defines the PeopleSoft web service end point for service operations and the authentication schema. It also cross-references a URL to link an alert back to a case. Once the connector is deployed, the user can configure it on the connector console.

Authentication is completed while mapping data from web services security (WS-security or wsse) on the case to the TicketingConnector authentication. TicketingService methods, such as *createTicket* or *updateTicket,* are used in EM to create or update a ticket

The BaseURL in the connector descriptor is the base URL for the EM console. The ExternalURL is the URL pointing to CRM case.

Note. WS-Security is a building block that is used in conjunction with other web services and application-specific protocols to accommodate a wide variety of security models and encryption technologies. WS-Security describes enhancements to SOAP (Simple Object Access Protocol) messaging to provide quality of protection through message integrity, message confidentiality, and single message authentication. These mechanisms are used to accommodate a wide variety of security models and encryption technologies. For this release, EM supports UserNameToken security on SOAP headers.

Trouble Ticket Template

The Trouble Ticket template is an XSLT file that transforms a message from the EM model format to the CRM model format. It is based on the XML schemas of the EM Alert and the Trouble Ticketing system.

The templates are used to construct tickets in the context of an EM alert. When a PeopleSoft Connector is notified, the EM alert information is transformed into a trouble-ticketing message that is used to create or update a case in the trouble ticketing system.

PeopleSoft delivers several default trouble ticket templates. You can easily modify them to fit your needs. The delivered XSL files include

- PSFTSampleTicketTemplate.xsl; default ticket template used to create or update a case.
- PSFTSampleTicketTemplate_AutoClose.xsl: used to create a new case if none already existed, or to add a note and auto close an existing case after it has been updated.
- createTicketResponse.xsl: used to transform the response from CRM to EM when the CreateCase or UpdateCase method is invoked. It returns the Case ID from CRM help desk as a Ticket ID to EM.

The system will create a new case or update an existing case depending on whether the ticket ID is provided in the EM alert message. If no case ID is provided from EM, the system creates a new case; otherwise, the system updates the case with the given case ID.

When creating a new case, the system adds an anonymous help desk case. The delivered default template specifies that the case will be created using the IT Help Desk business unit *(ITHDK),* but this can easily be modified in the template to use any desired business unit.

The system stores the EM alert summary information in the Case Summary field, and adds other information such as target type, metric, and key information in the Case Description field. Based on the business unit setup, the system can also auto-trigger the assignment engine in PeopleSoft CRM upon saving the case so that the case is assigned to the appropriate provider group and agent.

When updating an existing case, the system updates the severity on the HelpDesk case and adds the new EM information into a case note.

The following table lists the HelpDesk case fields which are given values in the delivered sample template when creating a new case.

Note. It is important to remember that these are sample templates provided only as examples, and that you may need to modify them to fit your requirements. Specifically, please note that some values specified here refer to sample data, not system data, and therefore are values that you would need to add to or modify in your production system.

CRM HelpDesk Case Field	***Value***
Case class	*R*
DisplayTemplateFamilyCode	*RC_HELPDESK*
Market	*GBL*
Vertical	*HD*
BusinessUnit	*ITHDK*
AnonymousCaller	*Y*
CaseType	*PROBL*
Category	*NETWO*
SpecialtyType	*ACCES*
CaseSummary	<value of EM *Message*>
CaseDescription	Based on these values from EM: • *EMUser* • *ConnectorId* • *Target Type* • *MetricColumn* • *MetricName* • *KeyColumn* • *KeyValues* • *Severity* • *CollectionTime* • *EventPageURL*
Severity	<value of EM *SeverityCode*> [note: requires CRM setup for Severity value]
Source	*EM* [note: requires CRM setup for Source value]

When updating a case, the delivered sample template creates a note for the case using the following field values from the EM system:

- *EMUser*

- *ConnectorId*
- *Target Type*
- *MetricColumn*
- *MetricName*
- *KeyColumn*
- *KeyValues*
- *Severity*
- *CollectionTime*
- *EventPageURL*

In the delivered sample template, we also provide entries marked as comments, which list many fields without an assigned value. This lets you know which fields are available for use when creating or updating a case. You can simply un-comment the lines for the fields that you want to use and enter the appropriate values.

View the Case web service definition for more technical information on the available Case fields. You can view the elements and fields that are included in each Case operation message through PeopleTools. Cases are created using the CreateCase service operation, and are updated using the UpdateCase service operation under the web service RC_CASE. Note that these service operations need to be activated as part of the integration setup.

To view a list of field names and aliases for a particular service operation:

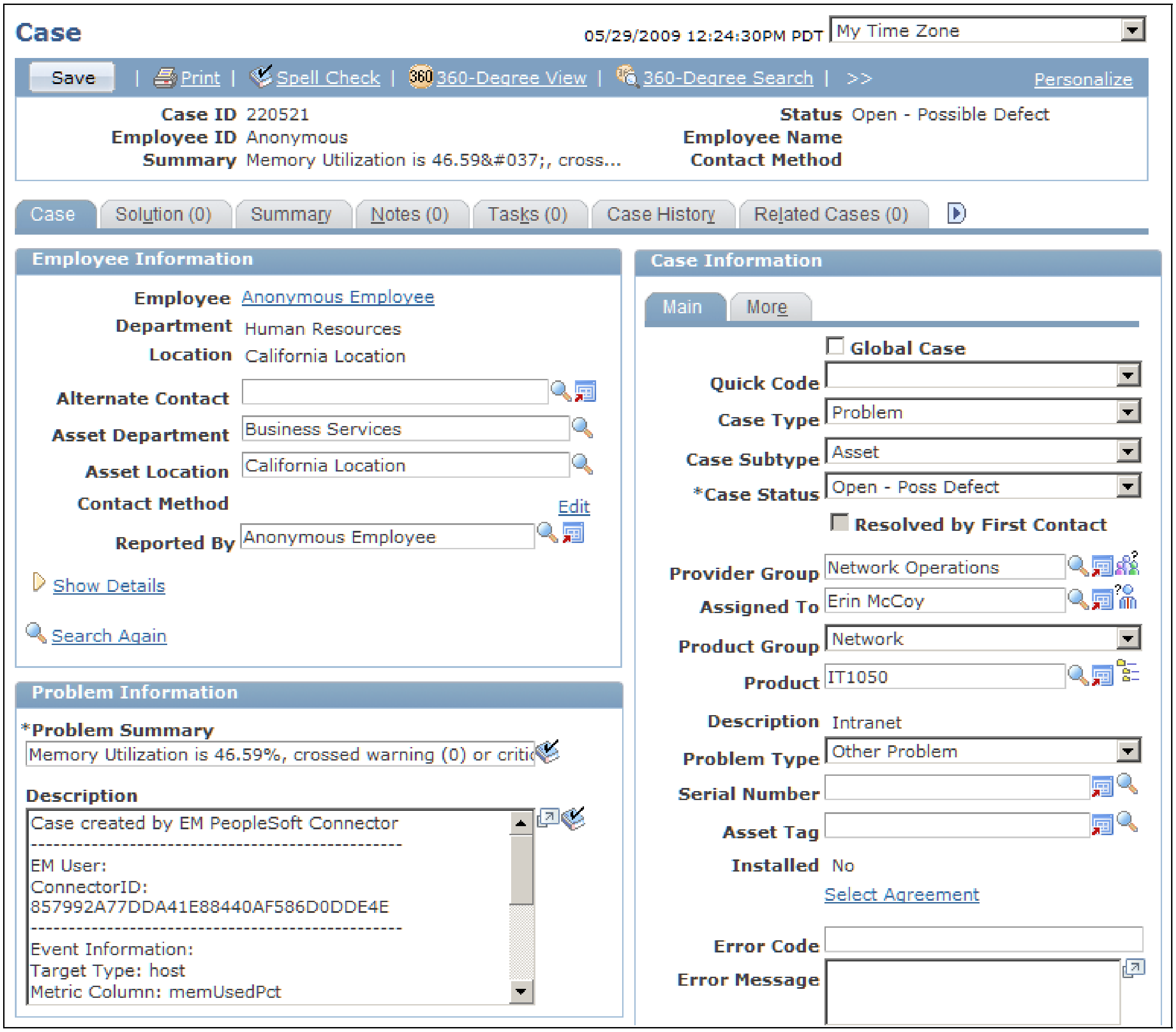
1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation.
2. Enter RC_CASE in the Service Operation field and click Search.

   The system lists all the service operations that are related to Case.
3. Select the service operation you want to view.
4. Click the View Message link in the Message Information area of the page for each message which you want to view .

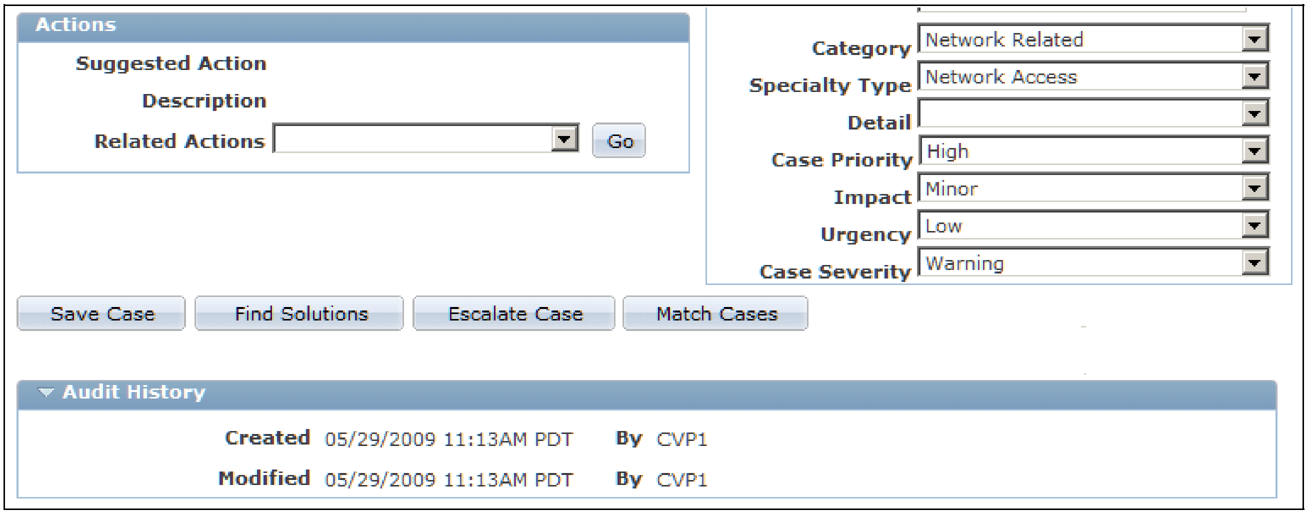
   The system opens the Message Definition page in a new browser.
5. Click the Message Name link under the Parts grid of the Message Definition page.
6. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

Sample Case Created from EM

This is an example of case created from EM:



Case page (1 of 2)



Case page (2 of 2)

Note that certain values shown in this example (including those for department, location, status, and priority) are derived directly from CRM defaults or configuration rather than from the template or EM data.

Note. When updating cases, the system doesn't override the Case Summary and Description fields. The EM alert summary and other additional information is added, however, as a note for the case.

Setting up Options in PeopleSoft CRM

This section discusses the following changes made within the PeopleSoft CRM system to enable the integration with Enterprise Manager:

- New source code.
- New severity codes.
- New Enterprise Manager link definition.
- New Enterprise Manager Active Analytics Framework (AAF) action type.
- New policy to create an Enterprise Manager related action.
- Related action changes on the Case page.

Note. Please refer to the appropriate sections in PeopleBooks for additional information on using the Source page, Severity page, Case page, AAF, related actions, link definitions, and web services.

See Chapter 3, "Setting Up Call Center Prompt Tables," page 51.

See Chapter 5, "Setting Up Links and Related Actions," page 99.

See Chapter 11, "Processing Cases," page 303.

See Appendix C, "Delivered Web Service and Service Operations," page 555.

See *PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework."

As you read the rest of this section keep in mind the following action items that must be completed in order to set up the integration:

- Create a new source code *EM.*
- Create new severity codes *15,20,* and *25.*
- Activate *Create Enterprise Manager Related Action* policy.

Also note that to enable the integration you must activate the Case web services operations under the RC_CASE web service.

See Appendix C, "Delivered Web Service and Service Operations," page 555.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker*

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration*

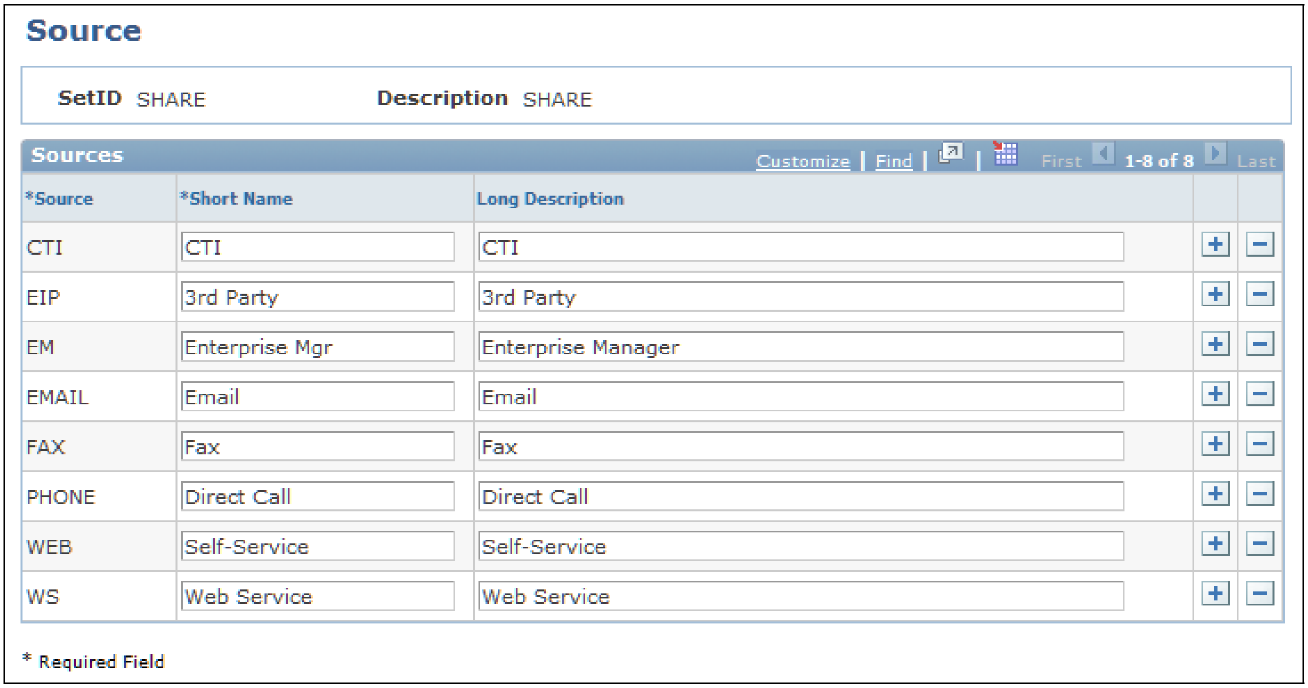
Note. In addition to these setup items within the PeopleSoft CRM system, remember that you must also deploy and configure the PeopleSoft connector, as described in a later section in this document.

New Source for Enterprise Manager

PeopleSoft sample data includes a new row in the Source table (PS_RC_SOURCE_TBL) for the IT Help Desk *(ITHD1)* setID to identify Enterprise Manager as a source for creating cases. The data contained in the Source field is EM, and the data contained in the Short Name and Long Description fields is Enterprise Mgr and Enterprise Manager, respectively.

Oracle delivers this information as sample data. You must add corresponding entries for any desired setID's in your production system

Access the Source page (Set Up CRM, Product Related, Call Center, Source.)



Source

SetID SHARE Description SHARE

Sources Customize | Find | First 1-8 of 8 Last

*Source	*Short Name	Long Description
CTI	CTI	CTI
EIP	3rd Party	3rd Party
EM	Enterprise Mgr	Enterprise Manager
EMAIL	Email	Email
FAX	Fax	Fax
PHONE	Direct Call	Direct Call
WEB	Self-Service	Self-Service
WS	Web Service	Web Service

* Required Field

Source page

Add an entry in the desired setID for the new source code *EM.* Note that this code must match the value for Source field on the trouble ticket template.

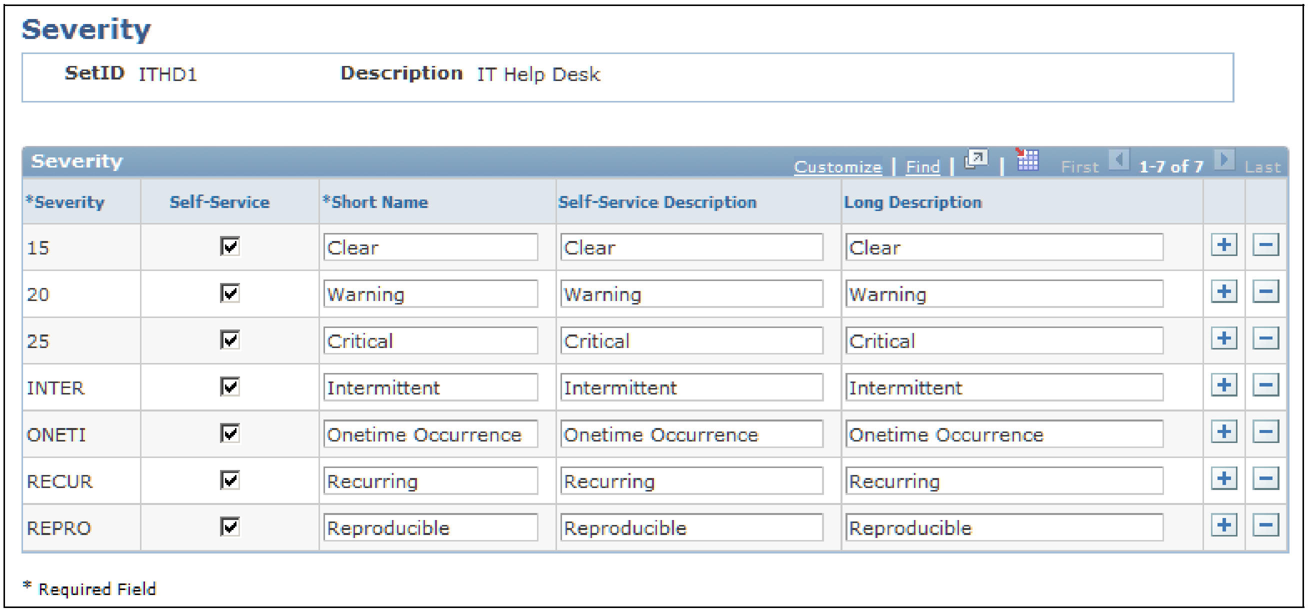
New Severity Codes for Enterprise Manager

Oracle's PeopleSoft CRM application provides these severity codes as sample data for the IT HelpDesk *(ITHD1)* setID. Although EM uses many more severity codes, only these codes are used for integration purposes:

- *25* - Critical
- *20* - Warning
- *15* - Clear

Oracle delivers this information as sample data. You must add corresponding entries for any desired setID's in your production system.

Access the Severity page (Set Up CRM, Product Related, Call Center, Severity.)


Severity

SetID ITHD1 Description IT Help Desk

Severity Customize | Find | First 1-7 of 7 Last

*Severity	Self-Service	*Short Name	Self-Service Description	Long Description
15	☑	Clear	Clear	Clear
20	☑	Warning	Warning	Warning
25	☑	Critical	Critical	Critical
INTER	☑	Intermittent	Intermittent	Intermittent
ONETI	☑	Onetime Occurrence	Onetime Occurrence	Onetime Occurrence
RECUR	☑	Recurring	Recurring	Recurring
REPRO	☑	Reproducible	Reproducible	Reproducible

* Required Field

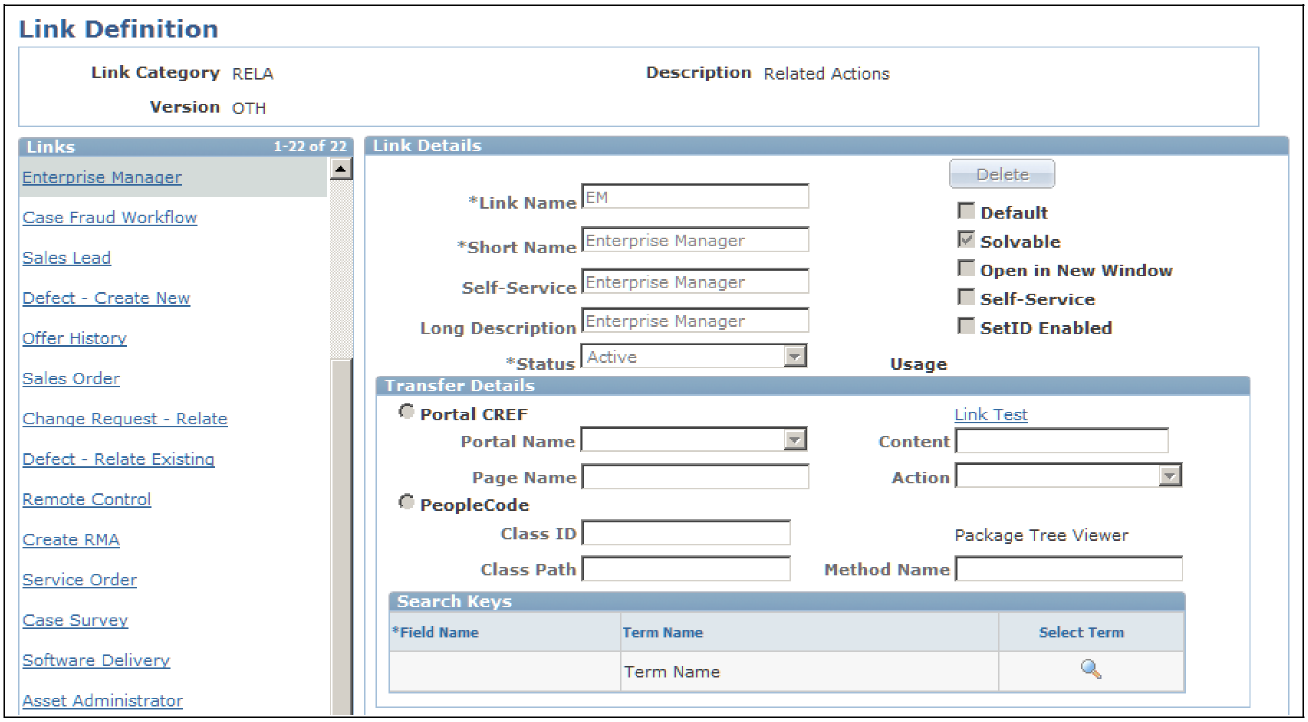
Severity page

Add entries in the desired setID for the three new severity codes (15 = Clear, 20 = Warning, and 25 = Critical).

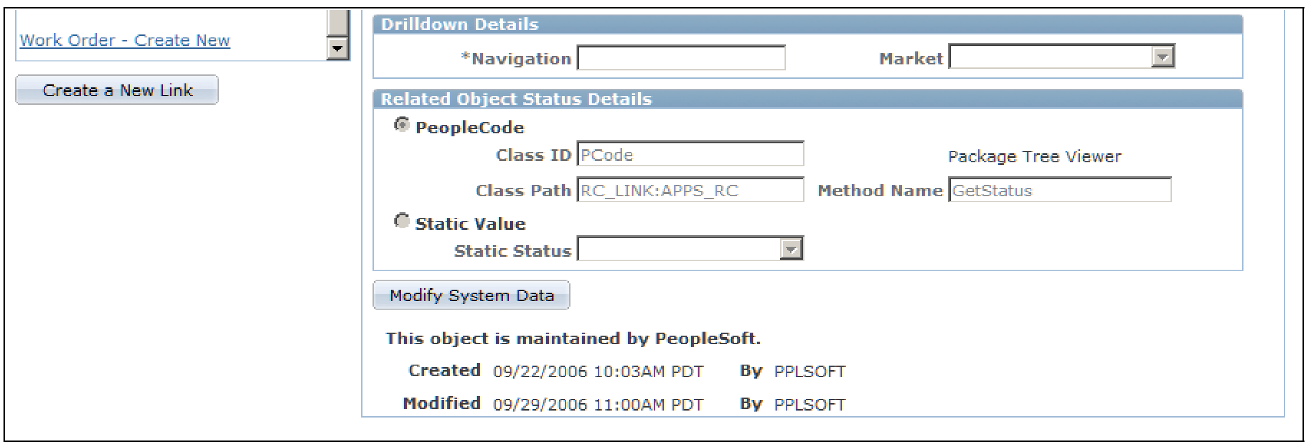
New Enterprise Manager Link Definition

Oracle's PeopleSoft CRM application includes a new link definition called *Enterprise Manager* under the Link Category *RELA.* This link definition is set up as *Solvable.* It will not be part of any link group; therefore, a user will not be able to perform this related action manually. It is a hidden option that can only be performed automatically by the system.

Access the Link Definition page (Set Up CRM, Product Related, Call Center, Link Definition).



Link Definition page (1 of 2)



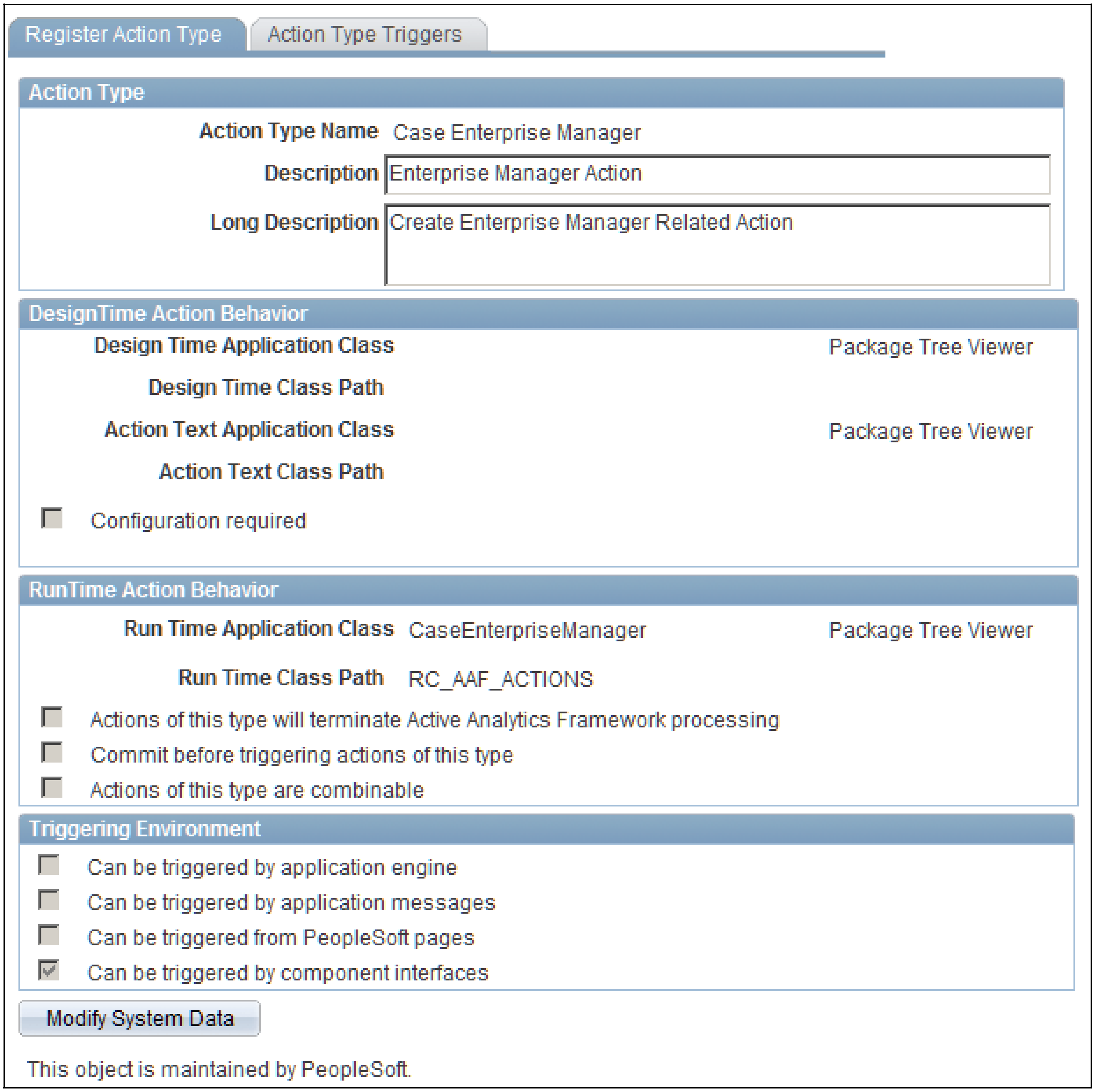
Link Definition page (2 of 2)

New Enterprise Manager AAF Action Type

To create a related action for the Enterprise Manager link definition on the Case page, Oracle's PeopleSoft CRM application delivers the new action type *Case Enterprise Manager*.

This action type can only be triggered from a component interface. You cannot trigger it from PeopleSoft pages. The Case Enterprise Manager action type will not have any design time configuration. It is delivered as system data.

Access the Action Type page (Enterprise Components, Active Analytics Framework, Action Framework, Register Action Type).



Register Action Type page

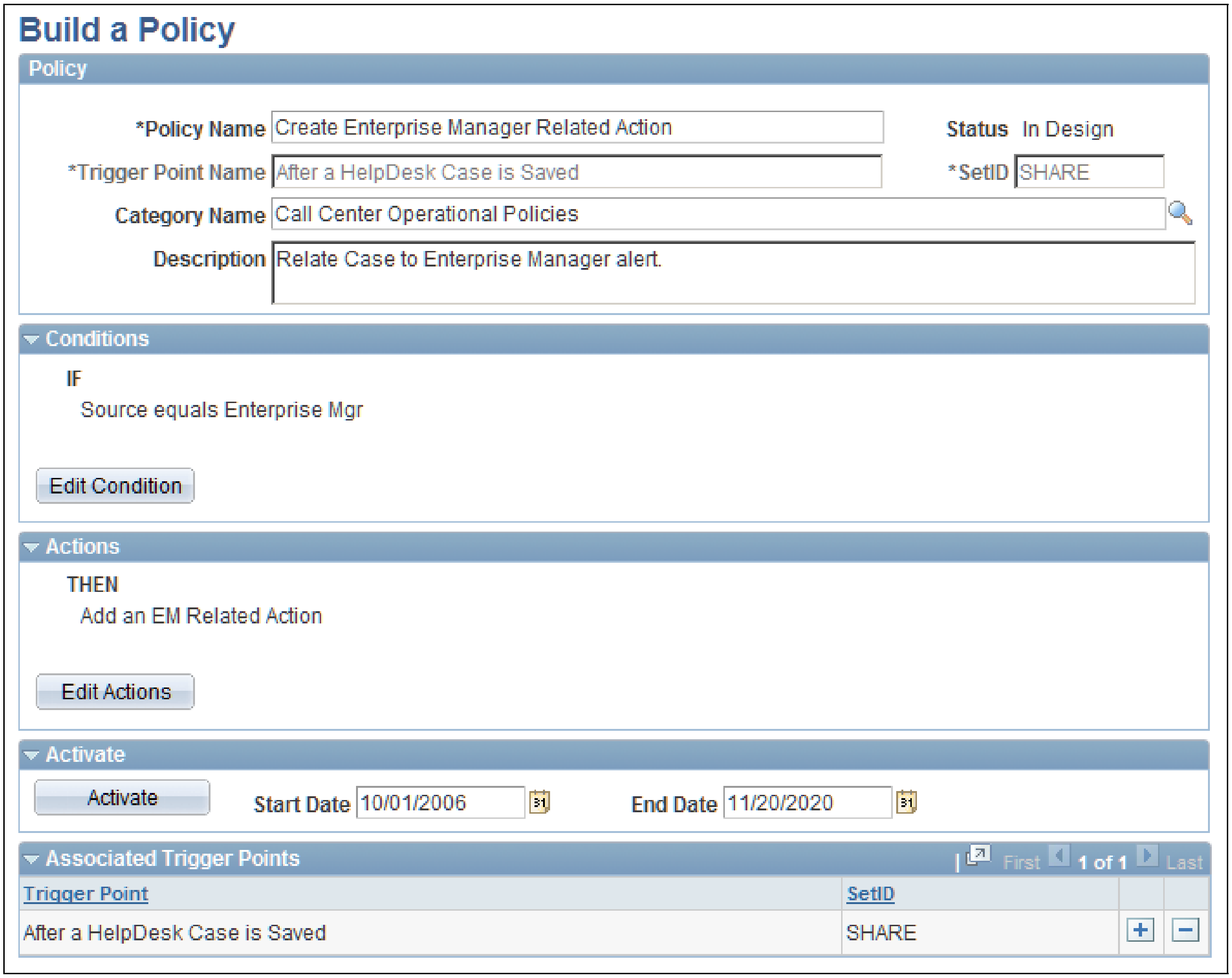
This action type is associated with the *After a Helpdesk Case is Saved* trigger point.

New Policy to Create an Enterprise Manager Related Action

Oracle's PeopleSoft CRM application includes a new policy called *Create Enterprise Manager Related Action* for the SHARE setID. This policy is associated with the *After a HelpDesk Case is Saved* trigger point. It is delivered with a status of *In Design.* You must update the status to *Active* if you wish to enable it for the EM integration.

The policy condition uses Enterprise Manager as its source. The policy action uses the Enterprise Manager AAF Action described earlier in this documentation.

Access the Build a Policy page (Enterprise Components, Active Analytics Framework, Policies, Manage Policies).



Build a Policy page

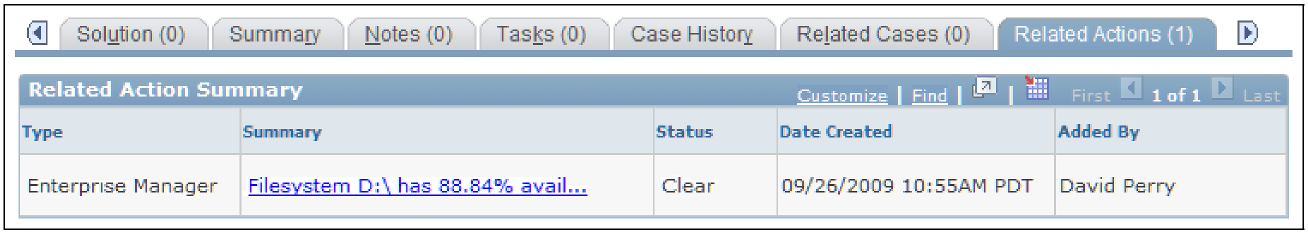
If you use a setID other than SHARE, copy this policy using the desired setID. Remember to activate the policy as part of the setup for the integration.

Related Action Changes on the Case page

The system creates a related action on the case page when a new case is created from Enterprise Manager. The related action summary contains a link that enables the user to transfer to the EM Console.

When a case is updated from Enterprise Manager, the system adds a new note to the case, but does not create a related action.

Access the Related Actions page (Support, Search Cases, Related Actions).



Related Actions page

To go to the EM Console Metrics Detail page, click the link under the Summary field in the Related Action Summary section.

Deploying and Configuring the PeopleSoft Connector to the EM Console

To enable the integration, several files need to be copied to the EM Server, and the Peoplesoft connector must be deployed, registered, and configured. This section discusses:

- Copying the JAR file.
- Deploying and registering the connector.
- Configuring the connector.

Copying the JAR File

PeopleSoft delivers a JAR file (PSFTConnector.jar) that includes the EM Event Model XML, the Peoplesoft Connector Descriptor XML, and the sample template XSLT files mentioned in this documentation for the Peoplesoft connector. Copy the JAR file to EM server oracle home.

Deploying and Registering the Connector

Several Enterprise Manager Command-Line Utility (emctl) commands are used to deploy and register the connector.

Note that the deploying command line shown in this section is applicable for EM 10gR3 and 10gR4. If you are using different version of EM, the command line may be a little different.

To extract the JAR file into $ORACLE_HOME/sysman/connector/<connector_name_wo_space> directory run this command

```
emctl extract_jar connector <jar_file_name> <connector name> <oracle home>
```


Note. The connector name is the name specified in the connector descriptor XML file. The command replaces the spaces in the connector name with underscores (_) in connector_name_wo_space. For instance, a connector called Peoplesoft Connector will have a directory of Peoplesoft_Connector under the directory of the Oracle home connector. If the Peoplesoft_Connector directory already exists, the extract_jar command will extract files to this directory; otherwise, it will create a new directory called Peoplesoft_Connector and copy files to it.

Register the connector using this command (use the user name *sysman*):

```
emctl register_connector connector  <PSFTConnectorDescriptor.xml> <serverName>⇒
 <port> <databaseSid> <username> <password> <oracle home>
```

Oracle delivers two templates: The PeopleSoft Sample Template is used to create or update a case. The PeopleSoft Auto-Close Template automatically closes out an open case with a solvable EM action.

Register the shipped ticket templates using this command:

```
emctl register_ticket_template connector <PSFTSampleTicketTemplate.xsl> <server⇒
Name> <port> <databaseSid> <username> <password> <connectorTypeName> <connector⇒
Name> <templateName> <templateDescription>
```

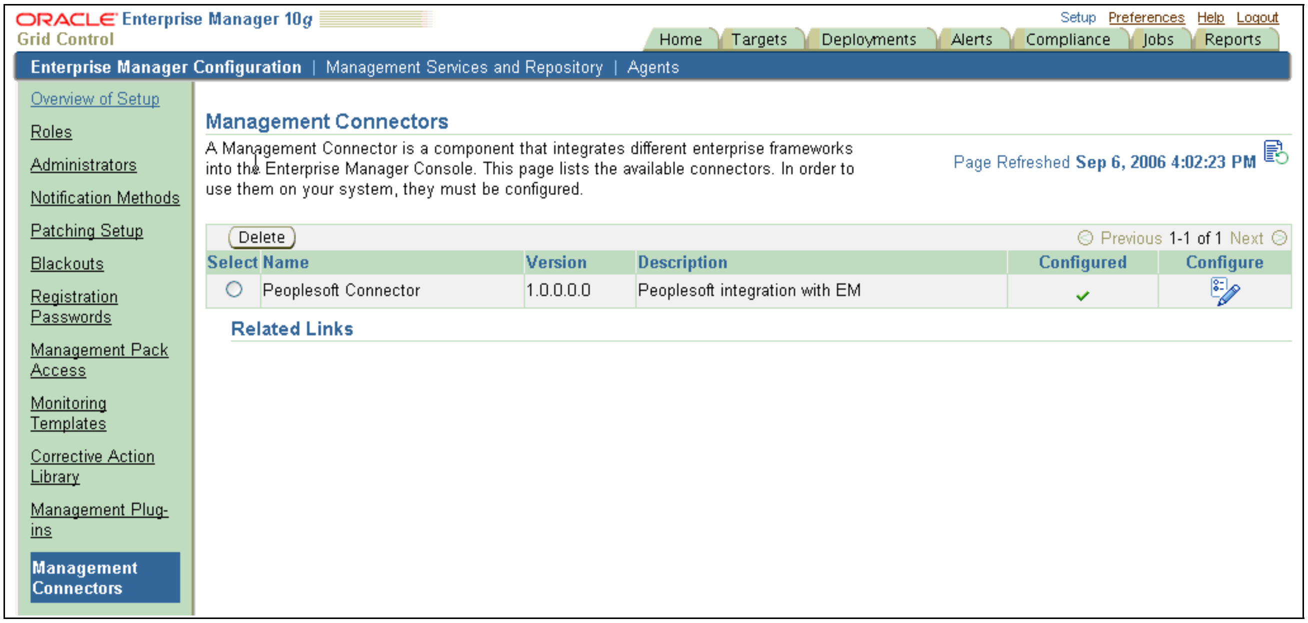
The `<connectorTypeName>` and `<connectorName>` use the same value: *Peoplesoft Connector.* The `<templateName>` and `<templateDescription>` are quoted strings, which can have spaces in them. The template name and description are displayed on the EM console.

Note. Because the EM connector can only support one active connector, make sure to delete the connector from the console first. After you re-deploy a connector, you need to re-register the templates again even if they have not changed, as the templates are disconnected at the time the connector is deleted.

Configuring the Connector

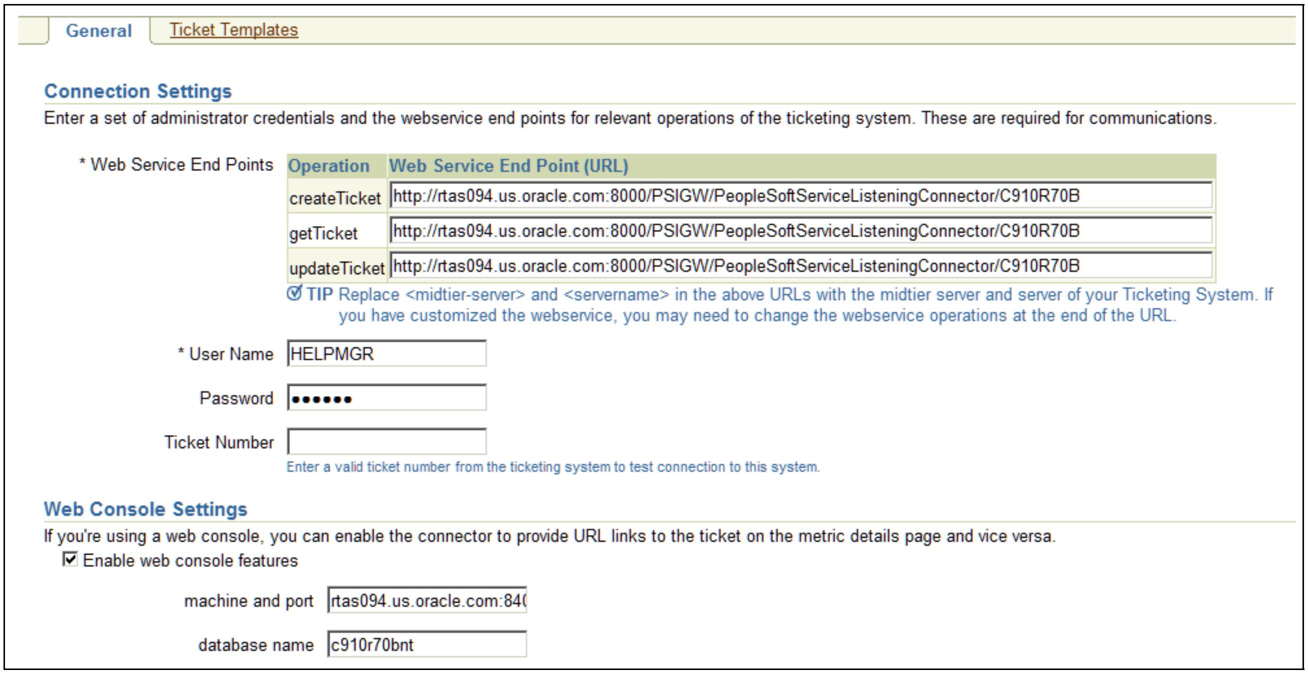
Once the connector is successfully deployed, you can log in to the EM console to configure the connector. On the configuration page, you can set up:

- *WS end points:* Specify WebService End Points for *createTicket*,*updateTicket* and *getTicket* web service operations.
- *WS credentials:* User ID and password to log in to the PeopleSoft CRM system for adding or updating a case.
- *Web console settings:* A URL that can transfer to the CRM case from the EM system. This is used on the EM metric detail page to drill into the case.
- *Grace period:* A time value that is compared against the data when an alert is cleared to the time when it has transitioned out of clear. If this span of time is greater than the grace period, a new ticket is created for the alert, otherwise, the ticket is reopened. The idea is not to create the case for the same alert within a defined time period.



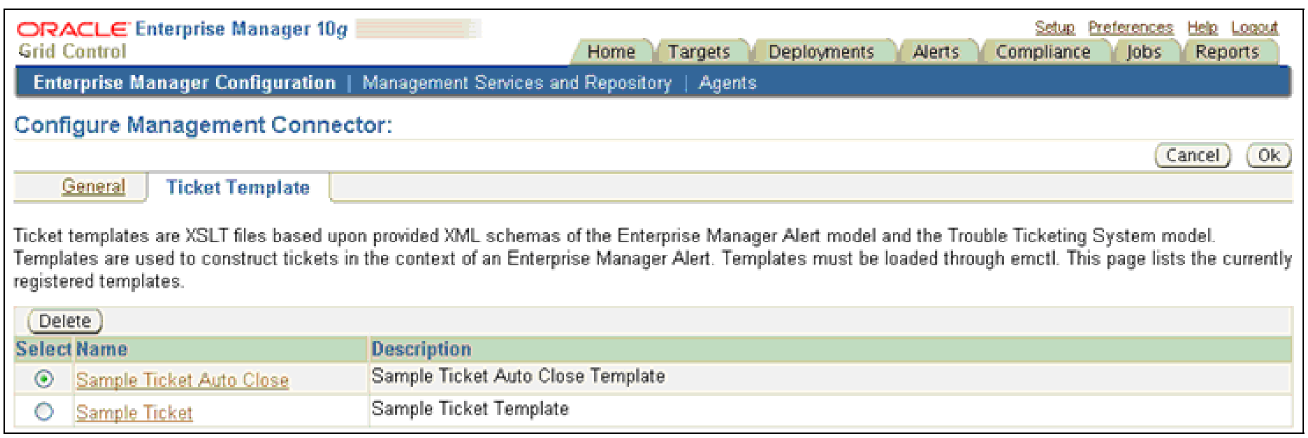
Oracle Enterprise Manager page

Select *Peoplesoft Connector* from the Oracle Enterprise Manager page and then click the Configure button to access the following page. Use the Configure Management Connector page to enter URLs for the WebService End Points. You can also add a user name and password and enter web console settings (machine and port and database name).



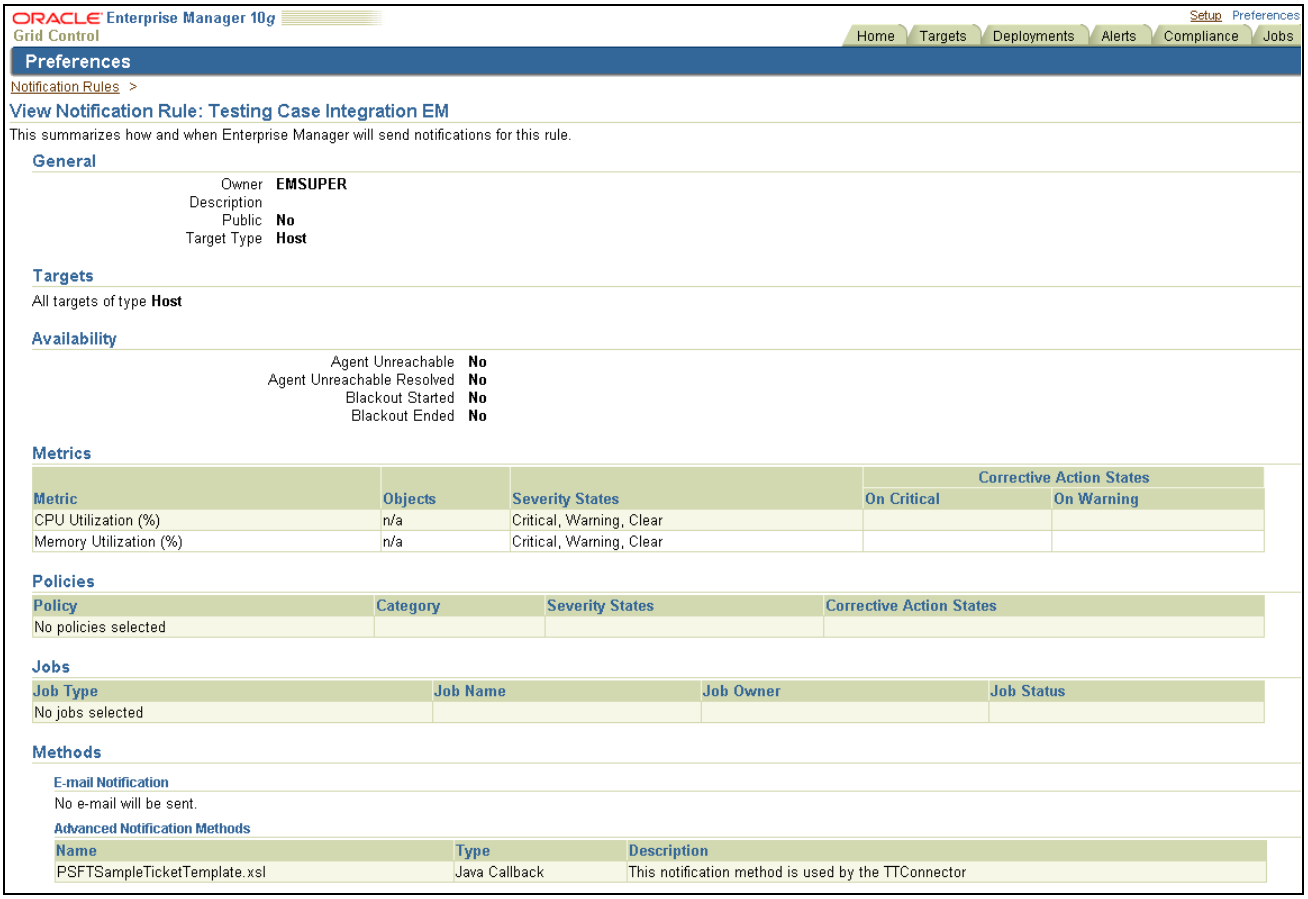
Configure Management Connector: Peoplesoft Connector (General Tab)

The Ticket Template page lists all registered templates for the connector.



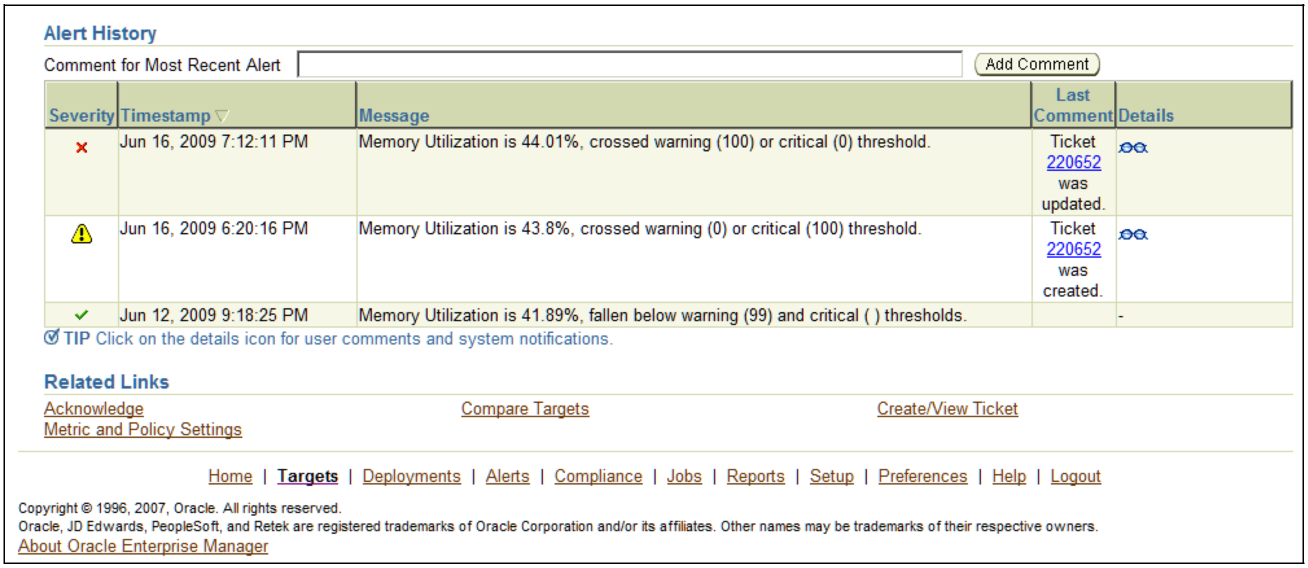
Configure Management Connector: Peoplesoft Connector (Ticket Template Tab)

Set up your desired rules to use the registered template to create a case in the HelpDesk system.



Notification Rules: View Notification Rule page

Once a case is created or updated, the user can drill into case from the EM Metric Detail page



Alert History page

Please refer to Enterprise Manager documentation for additional information on using the EM Console and the Alert History page.

Appendix E

Delivered Active Analytics Framework System Data for Call Center Applications

This section lists terms that are delivered for PeopleSoft call center applications in these areas:

- Business Processes
- Case Details
- Link Definition
- Notification Delay
- Case Metrics
- RMA Details

Delivered Terms

PeopleSoft CRM delivers a variety of terms that you can use to build policies for your call center applications. They are categorized by subject areas using a folder structure. To facilitate term lookup when building a policy or creating a correspondence template, the system displays a term selection page.

There are over 100 terms in the Case Details folder. The following list is a small subset of all of the delivered terms. These terms are typically used when building policies that impact the PeopleSoft Support and HelpDesk applications:

Subject Area	***Term***	***Description***
Business Processes	Case Sample Worklist Operator ID	Returns the operator ID of the sign-on user as a string.
	Case Sample Structured Worklist Rowset	Returns the operator ID of the sign-on user as a rowset.
Case Details	Case ID	Returns the ID of the case.
	Case Restore Minutes	Returns the number of minutes, based upon the entitlements, within which the case should be completed.

Subject Area	***Term***	***Description***
	Case Response Met Date	Returns the date the agent responded to the problem associated with the case.
	Case Restore Met Date	Returns the date the technician restored service or fixed the problem associated with the case.
	Account Number Specified in Case	Returns the account number specified on the case.
	Site Identification Number	Returns the site identification number or SIN.
	Case Notes Details	Returns the details from the notes that were entered for a case.
	Case Status Category	Returns the case status category.
	Case Agreement Warranty	Returns the warranty name associated with the case.
	Case Agreement Line	Retrieves the case agreement line for a specific case.
	Asset Tag	Returns the asset number of the installed product.
	Serial ID	Returns the serial ID of the product that is entered on the case.
	Person PIN	Returns the personal identification number or PIN of the employee associated with the case.
	BO_ID of Case Reported By	Returns the business object ID of the contact person who reported the case.
	BO_ID of the Customer Reporting the Case	Returns the business object ID of the customer reporting the case.
	Role Type ID of the Customer Reporting the Case	Returns the role type ID of the customer reporting the case.
	Role Type ID of the Contact Reporting the Case	Returns the role type ID of the contact reporting the case.
	BO_ID of the Site Reporting the Case	Returns the business object ID of the site reported on the case.

Subject Area	***Term***	***Description***
	BO_ID of the Contact Reporting the Case	Returns the business object ID of the contact reporting the case.
	Work Order Description Change	Returns the description of the work order.
Link Definition	Select a Solution <SOLUTION_ID>	Allows users to select a solution.
	Select a BPEL Process <BPEL_ID>	Allows users to select a BPEL process.
	Select a Business Project<BP_ID>	Allows users to select a business project.
	Select an Advisor Script <ADV_ID>	Allows users to select an advisor script.
	Select a Branch Script <SCRIPT_ID>	Allows users to select a branch script.
	Select a Dialog Business Unit <BUSINESS_UNIT>	Allows users to select a business unit under which their dialogs would reside.
	Select a Dialog ID <DIALOG_ID>	Allows users to select a dialog ID.
	Select an External Event Trigger <EXT_EVENT_TRIGGER>	Allows users to select an external event.
Notification Delay	<Percentage> Restore Minutes	Used to specify the percentage of entitled restore time when a notification can be sent.
	<Percentage> Response Minutes	Used to specify the percentage of entitled response time when a notification can be sent.
Case Metrics	Number of Priority <PRIORITY> Cases	Returns the number of priority cases.
RMA Details	RMA Business Unit	Returns the RMA Business Unit.
	RMA ID	Returns the RMA ID

Appendix F

PeopleSoft CRM Call Center Reports

This appendix provides an overview of PeopleSoft Support and PeopleSoft HelpDesk reports and enables you to view summary tables of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

PeopleSoft CRM Call Center Reports: A to Z

These tables list the PeopleSoft Support and PeopleSoft HelpDesk reports, sorted alphanumerically by report ID.

This section discusses:

- PeopleSoft HelpDesk case reports.

  Except for report *RCC2009,* all HelpDesk-specific report IDs start with *RCC1*

- PeopleSoft Support case reports.

  All Support-specific report IDs start with *RCC2.*

- Solution reports (shared by both applications).

  Solution report IDs start with *RCC2.*

Note. All reports in this appendix are Crystal reports. For most reports the query name and report name are the same. If the query name is different, it appears in the Report ID and Report Name column. Unless otherwise noted, the from date and through date for the cases included in a report refer to the case creation date.

PeopleSoft HelpDesk Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RCC1002 HelpDesk Cases By Agent	This report categorizes cases according to the agents to whom the case is assigned. For each case, the report shows the case ID, status, priority, contact name, date created, and subject.	HelpDesk, Reports, Case By Agent, HelpDesk Case By Agent	RUN_RCC1002
RCC1003 HelpDesk Cases By Department	This report lists the departments that have reported cases. For each department, the report shows the number of cases reported.	HelpDesk, Reports, Case By Department, HelpDesk Case By Department	RUN_RCC1003
RCC1004 HelpDesk Cases By Priority (RC_CASES_BY_PRIORITY)	This report provides a list of cases ordered by priority and gives the total number of cases for each priority. For each case, the report shows the priority, case ID, status, department, reported by, date created, and assigned to agent.	HelpDesk, Reports, Case By Priority, HelpDesk Case By Priority	RUN_RCC1004
RCC1005 HelpDesk Cases By Type	This report provides a list of cases categorized and subtotaled by case type. For each case, the report shows the case ID, priority, status, caller name, date created, and assigned to.	HelpDesk, Reports, Case By Type, HelpDesk Case By Type	RUN_RCC1005
RCC1006 HelpDesk Cases By Status	This report lists case statuses and gives the number of cases with each status.	HelpDesk, Reports, Case By Status, HelpDesk Case By Status	RUN_RCC1006
RCC1007 HelpDesk Case By Category/Type/Detail (HDBYCATETYDET)	This report groups cases by category and provides the total number of cases for each category. For each case, the report shows the case ID, category, type, detail, creation date, caller name, status, and summary.	HelpDesk, Reports, Case By Category/Type/Detail, HelpDesk Case By Ctg/Type/Dtl	RUN_RCC1007

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RCC1008 HelpDesk Case Information	This report provides detailed information for cases, including most of the data shown in the case component.	HelpDesk, Reports, Case Information, HelpDesk Case Information	RUN_RCC1008
RCC1009 HelpDesk Cases Status By Agent	This report lists agents to whom cases have been assigned. For each agent, the report shows the agent's ID and name and the number of open cases for that agent in total and broken out by case status.	HelpDesk, Reports, Case Status By Agent, HelpDesk Case Status By Agent	RUN_RCC1009
RCC1010 HelpDesk Time To Close By Agent (RC_CLOSEBYAGENT)	This report lists agents who have been assigned cases. For each agent, the report shows the agent's ID and name, a list of the agent's closed cases, the total number of cases closed, and the average number of days to close. The case shows the case ID, priority, date opened, date closed, and days to close.	HelpDesk, Reports, Time To Close By Agent, HelpDesk Time To Close By Agent	RUN_RCC1010
RCC1011 HelpDesk Cases By Employee	This report lists employees who have reported cases. For each employee, the report shows the number of cases opened.	HelpDesk, Reports, Case By Employee, HelpDesk Case By Employee	RUN_RCC1011
RCC1012 HelpDesk Cases by Business Project	This report lists business projects that have been used in cases. For each business project, the report shows the number of cases where the business project was used.	HelpDesk, Reports, Case By Business Projects, HelpDesk Case By Business Projects	RUN_RCC1012
RCC2009 HelpDesk Employees With Case	This report lists employees who opened cases during the specified time period. For each employee, the report provides a name, location, department, telephone number with extension, and email address. No case information appears on this report.	HelpDesk, Reports, Employees with Case, HelpDesk Employees With Case	RUN_RCC2009

PeopleSoft Support Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RCC2000 Agreement Type Statistics (RCC_3007)	This report provides statistics for agreements used during a specified date range, including the number of cases opened, the number of cases closed and the average time to close in days and in hours.	Support, Reports, Agreement Statistics, Agreement Statistics	RUN_RCC2000
RCC2001 Case Information	This report provides detailed information for cases, including most of the data shown in the case component.	Support, Reports, Support Case Information	RUN_RCC2001
RCC2002 Case by Age	This report categorizes cases by creation date and then by customer. For each case, the report shows the case ID, priority, status, case type, contact name, assigned to agent, and subject.	Support, Reports, Cases By Age	RUN_RCC2002
RCC2003 Case by Agent (RC_CASESBYAGENT)	This report lists agents to whom cases have been assigned. For each agent, the report shows the agent's name and the number of cases assigned to the agent, opened by the agent, and closed by the agent. The report also provides the average time to close (in days and hours) for cases that the agent closed.	Support, Reports, Cases By Agent, Case By Agent	RUN_RCC2003
RCC2004 Case by Customer	This report categorizes cases by customer. For each case, the report shows the case ID, priority, status, product ID, case type, contact name, date created, assigned to agent, and subject.	Support, Reports, Cases By Customer	RUN_RCC2004

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
RCC2005 Cases by Priority	This report categorizes cases by priority and status, then by customer. For each case, the report shows the case ID, case type, date created, and subject.	Support, Reports, Cases By Priority, Cases by Priority	RUN_RCC2005
RCC2006 Case by Product	This report categorizes cases by product. For each case, the report shows the product ID, case ID, priority, status, case type, contact name, date created, assigned to agent, and subject.	Support, Reports, Cases By Product, Cases by Product	RUN_RCC2006
RCC2007 Cases by Type	This report categorizes cases by case type. For each case, the report shows the case ID, priority, status, contact name, date created, assigned to agent, and subject.	Support, Reports, Cases by Type, Cases By Type	RUN_RCC2007
RCC2008 Cases Reopened	This report lists cases that have been reopened. For each case, the report shows the case ID, the date the case was reopened, and the user who reopened the case. **Note.** This report requires that the Case Re-Opened policy be activated in the Predictive Analytics Framework definition.	Support, Reports, Cases Reopened, Cases Reopened	RUN_RCC2008
RCC2013 Support Agreement Usage	This report lists agreements that have been associated with cases. Agreements are categorized by customer. For each agreement, the report shows the agreement code, the start date, the end date, and the number of cases that are associated with that agreement.	Support, Reports, Support Agreement Dates, Support Agreement Dates	RUN_RCC2013

See Also

PeopleSoft Enterprise CRM 9.1 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Solution Reports

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RCC2012 Solutions Usage	This report lists solutions that were used in cases created during the specified date range. For each solution, the report shows the solution usage count, solved count, and success rate.	Solutions, Reports, Solutions, Solution Usage	RUN_RCC2012
RCC2014 Top Ten Solutions by Product	For each included product, this report lists the ten solutions that most often resolved cases that were created during the specified date range. For each solution, the report shows the number of cases solved for that product.	Solutions, Reports, Top Ten Solutions by Product, Top Ten Solutions by Product	RUN_RCC2014

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