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Oracle PeopleSoft HelpDesk for Human Resources

Today's Human Resource organizations are faced with the challenge of providing rapid and high-quality customer service to their workforce. HR staff is busy managing call volume while still providing accurate, consistent solutions and guidance to employees in the entire organization. HR service delivery can become more efficient with smart call routing, intuitive case management, balanced agent workload, and effective self-service options.

Service Delivery Best Practices

Service center best practices across all industries suggest that a case be created for every inquiry that is handled by an agent, regardless of how routine the question or issue may be. PeopleSoft HR HelpDesk delivers complete case management capabilities, enabling organizations to capture and categorize employee inquiries, analyze case trends, and guide staff through case management best practices.

To help meet these challenges, organizations worldwide have deployed PeopleSoft HR HelpDesk to streamline their HR service delivery from Request-to-Resolve, allowing their administrative staff to focus on strategic business initiatives and high-touch. Using PeopleSoft HR HelpDesk, your workforce has a centralized knowledgebase integrated with case management to enable information sharing across HR for consistent and quick resolution of employee inquiries.

Increase Adoption of Low-Cost Service Channels

Employees expect to have technology-based options to find solutions to their HR issues and questions such as "How do I enroll in the 401K Program?" or "What is the Employee Stock Purchase Plan, or ESPP?". Some employees prefer to use self-service, or a knowledge-base, to search for the solution themselves, while others prefer to speak directly to an HR representative.

PeopleSoft HR HelpDesk provides a variety of live and offline channels for your workforce to engage with HR. When live interaction is preferred or required, the phone and chat channels are available. Your workforce can send an email to HR with questions or problems. The Email Response Management System (ERMS) allows to intelligently send auto-responses with answers to employee questions and/or to automatically create a case. Deploying lower-cost channels like self-service, chat, and email makes it simple and convenient for employees to find the information they are looking for, using a user-friendly experience.

Employee Self-Service

Many employees today are resourceful and accustomed to using search and self-service application tools to find answers to issues. Organizations are allowing employees to either use organization-provided devices when using self-service

Key Features

- Self-service solution search with knowledgebase content management.

- Employee 360-degree view using secure, real-time integration with PeopleSoft Human Resources and Oracle e-Business Suite Human Resources.

- Seamless user experience across PeopleSoft HR HelpDesk and HCM applications.

- Secure direct view and edit accessibility to HCM data and applications.

- Support for multichannel engagement with HR.

- Secure case management for sensitive employee relation issues.

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applications, or allow employees to access self-service applications using their own device, regardless of the functional area, to provide information to employees. PeopleSoft HR HelpDesk's Employee Self-Service Homepage is the launching point for your employees to find solutions and related information, create cases, interact with HR agents, and access HR transactions as needed.
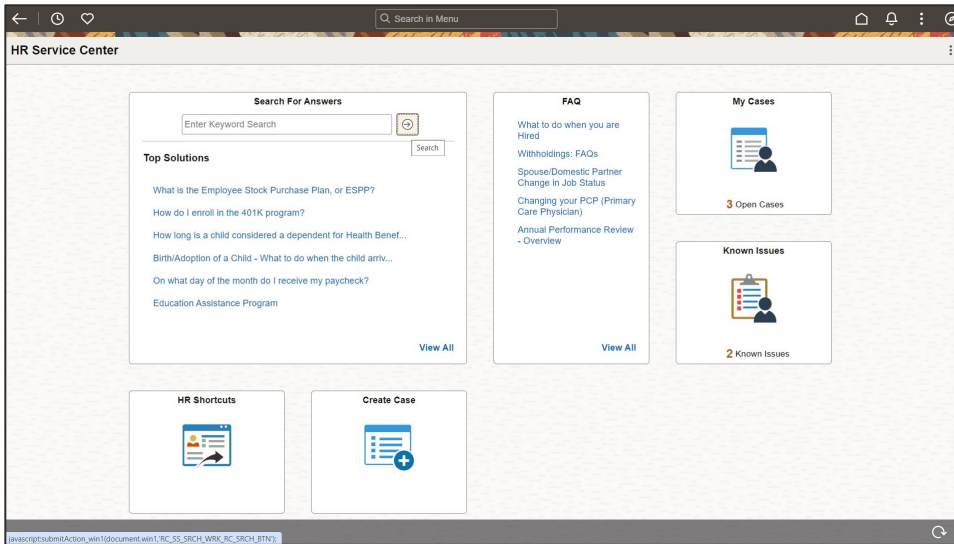

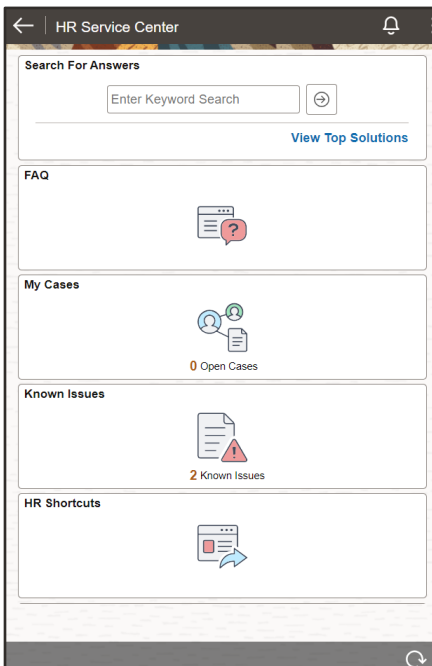Figure 1. HR HelpDesk Employee Self-service Homepage - Desktop.

Figure 2. HR HelpDesk Employee Self-service Homepage - Mobile Device.

The Employee Self-Service Homepage leverages configurable dashboard functionality. Each section is configurable and makes it simple for employees to personalize and highlight what is most important to them.

Key Benefits

- Effectively manage and automate a comprehensive internal HR support organization.

- Lower the overall cost of your HR service delivery while improving your internal service level response.

- Empower your HR professionals with tools to consistently resolve common inquiries and problems.

- Apply service delivery best practices to manage HR case volume.

- Management insight into case volume and root causes.

- Identify policies that require workforce communications or training.

- Assess HR policy effectiveness and compliance.

- Reduce organizational risk and liability with sensitive employee relation issues.

- Find and Review Solutions, Create Cases, View My Cases, Review Solutions, and Share Feedback using PeopleSoft HCM Employee Self Service.

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- The **Search for Answers** tile provides powerful search capabilities leveraging PeopleSoft search technology that features keyword search to navigate content in solutions, FAQs, cases, and known issues.

   Built-in **Helpful and Feedback** functionality on the Solution page allows employees to mark a solution as helpful or not helpful. In addition, the ability to provide feedback for a solution allows agents, content owners, or subject matter experts to work towards improving the quality of a solution.

- The **FAQ** tile offers a predefined, configurable list of frequently asked questions that include historical information gathered from other cases with similar content.

- The **My Cases** tile allows employees to view the status of cases and manage cases submitted to HR.

- The **Known issues** tile displays a predefined, configurable list of global cases

- The **Create Case** tile allows employees to create a case using a simplified guided process.

- The **HR Shortcuts** tile links to HR applications or other relevant systems

Provide Confidence to Employees with Competency-Based HR Agent Assignment

When the channel interaction results in the creation of a case, a service level agreement is assigned and enforced with a commitment for response and resolution. In PeopleSoft HR HelpDesk, all channels route inquiries based on the type of issue, ensuring that they are routed to the right person the first time. Competency and skill-based assignment of cases is used to ensure that the agent is qualified to respond to the inquiry.

Actionable Insights Dashboards for HR Agents and HR HelpDesk Managers

PeopleSoft HR HelpDesk provides a one-stop dashboard for HR Agents and HR Managers allowing them to stay on top of day-to-day incoming cases, case backlogs, and unassigned cases to deliver superior service to employees.

Increase Productivity for HR Helpdesk Agents with Agent Backlog Insights Dashboard

The Agent Backlog Insights dashboard provides visibility into open cases, priorities, and status. A list of top priority cases, cases at risk of exceeding SLAs, backlog cases, and case closure rates are displayed with access to case details just one click away.

Maximize lower-cost channels for servicing your workforce:

- Enable employees to find answers to their questions or create cases using HR Helpdesk Self-Service and/or PeopleSoft HCM Self-Service.

- Enable phone and chat for live interaction.

- Intelligently send auto-responses to employee questions sent through an email using the Email Response Management. System (ERMS) and/or create case automatically.

- Provide a consistent service experience for employees across any channel they use to engage with your HR staff.
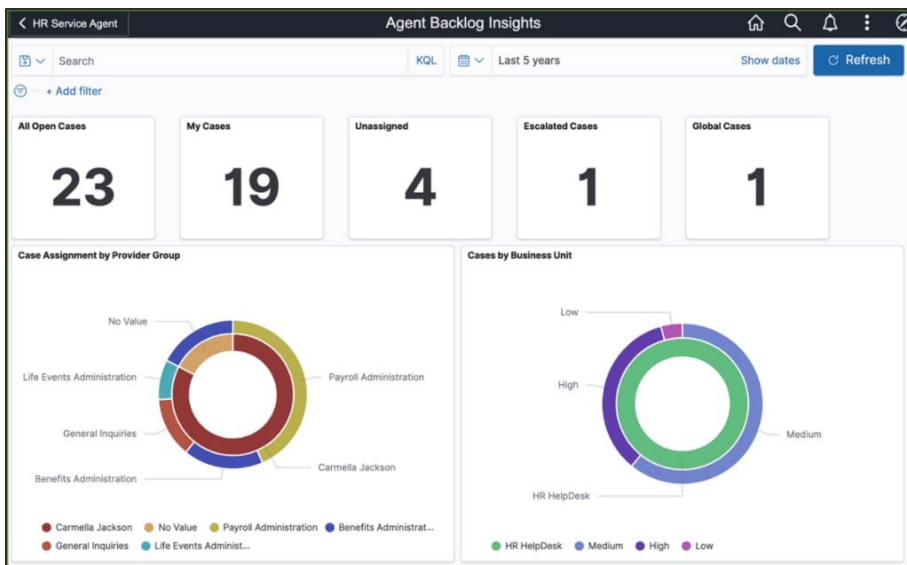
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Figure 3. HR Agent Backlog Insights Dashboard for HR Helpdesk Agents

Empower HR Helpdesk Managers to Deliver Superior Service to Employees

The Manager Backlog Insights dashboard helps HR Helpdesk Managers manage case backlog on a day-to-day basis and review priorities for team members such as how many cases are escalated.
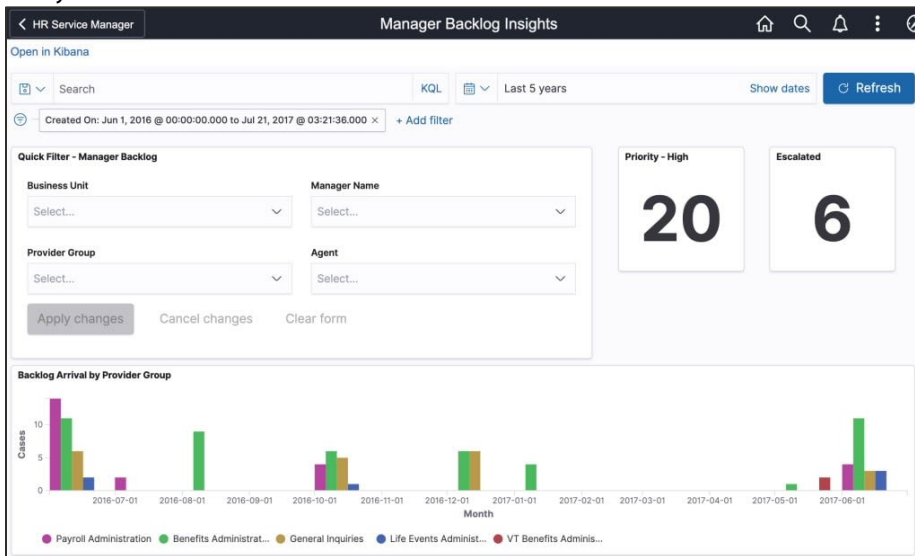

Figure 4. HR HelpDesk Manger Backlog Insights Dashboard for HR Helpdesk Managers.

Designed for HR Helpdesk managers, the Performance Insights dashboard allows them to review team performance to ensure quick closure of cases and deliver superior service to employees.

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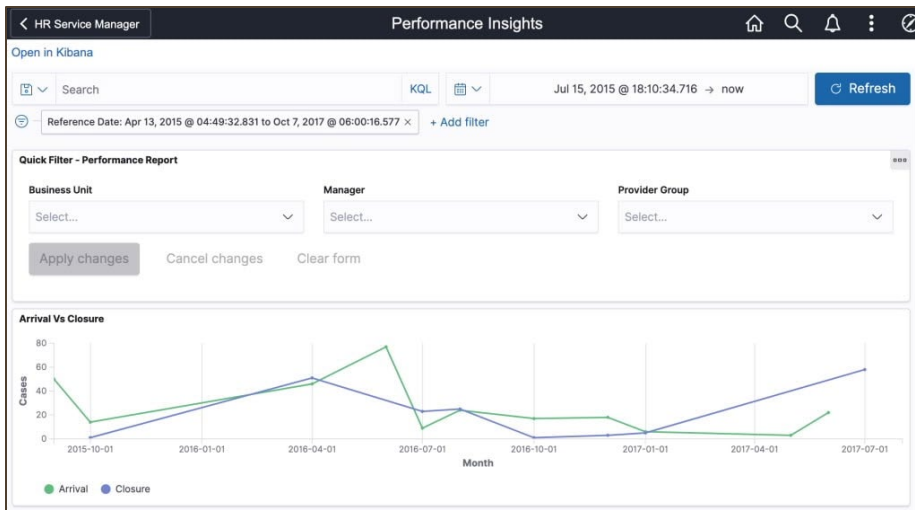
Figure 5. HR HelpDesk Performance Insights Dashboard for HR Helpdesk Managers.

Efficiency for HR HelpDesk Agents Through Integration with PeopleSoft HCM

The PeopleSoft HR HelpDesk provides a tightly integrated solution with PeopleSoft HCM. This out-of-the-box integration enables a real-time employee 360-degree view for agents fielding employee inquiries, action links to navigate seamlessly between your HR system of record and HR HelpDesk, and automatic case creation to track an HR action that originated in PeopleSoft HR from request-to-resolve.

360 Degree View

About two-thirds of help desk calls fall into the category of employee data verification. For example: "How much is the contribution to my 401k?". "What are my tax withholdings?" The quickest resolution for these types of data verification questions is the PeopleSoft HR HelpDesk 360-degree view, which provides the HR Helpdesk agent a complete view of an employee's current Human Resources, Payroll, Absence, and Benefits information. From this real-time view, your agents can also perform HR HelpDesk functions, such as creating a case, viewing open cases, and viewing the case history for an employee. With a combined view of HR and HelpDesk – all on one page, the need to hunt through multiple transaction pages within HelpDesk or in your HR system is eliminated.

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Figure 6. 360 Degree View – HR Agent Case Management & History.

Figure 7. 360 Degree View – Real-time Job, Pay, and Benefits directly from your HR system.

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Figure 8. 360 Degree View – Direct Reports for Managers.

Action Links

Through the use of delivered integrated Action Links, PeopleSoft HR HelpDesk makes it simple for authorized HR agents to access the PeopleSoft HR system of record to make necessary updates or retrieve additional information.

Action links are predefined drop-down lists of commonly accessed HR content, which is organized by category. They are related to Benefits, Payroll and Learning Management in addition to others. This functionality allows HR agents to log into the HR application using a single sign-on and access the record of the employee they are assisting.

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Figure 9. Action options.

Automatic Case Creation

You can easily configure PeopleSoft HR HelpDesk to automatically create an HR case whenever a specific action is triggered in PeopleSoft HCM Employee Self-Service or PeopleSoft HCM Manager Self-Service. HCM actions typically require review by multiple people or groups before they are completed. Changes to employee personal data, payroll, compensation, benefits, leave requests, and learning and development are just a few examples of HR actions that benefit from having an associated case for tracking and reporting purposes.

Empower HR Agents with Recommended Solutions for Simpler Inquiries

You may employ best practices by guiding HR agents through the steps or tasks they need to follow based on the type of HR service inquiry. For simpler inquiries, PeopleSoft HR HelpDesk recommends solutions to resolve the inquiry, whether to view a specific solution in the knowledgebase or use an action link to access a specific page in the HR system.

Auditing Capabilities:

With auditing and history tracking capabilities, you can ensure accountability throughout the case management process and reduce broader organizational risk.

Track Changes with Case History such as:

- Case detail changes
- Assignment changes
- Notes additions
- Other field changes

Audit Change Tracking:

- Before and after values
- Who made the changes
- When the changes were made

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Figure 10. All case management activities are accessible on one page.

For more complex processes where there may be multiple steps that need to be carried out by many individuals or other groups over time, Task Management can be used to orchestrate that process. Tasks are automatically generated and assigned based on the type of inquiry, and automated workflow is used to alert assignees to the tasks assigned to them.

PeopleSoft HR HelpDesk provides comprehensive and fully configurable workflow management, with an alert and notification engine that keeps case resolution on track. Agents and management can be alerted when cases are reassigned, if a service level agreement commitment is at risk, or when escalation is required. Service Level Agreements (SLAs) are another important component of best practices, ensuring timely response to inquiries, adherence to commitments, and identification of SLA bottlenecks. The workflow engine also keeps employees in the loop with email notifications regarding case updates and case closure emails with case solution information.

To further improve HR agent productivity, PeopleSoft HR HelpDesk delivers a framework that simplifies the handling of global issues that affect many employees. For example, in a scenario when a payroll error results in inaccurate employee paychecks, an influx of inquiries could result that overwhelm HR staff. With the global issue alerting framework staff is alerted to global issues and can quickly associate new inquiries to the master global case. When the global case is resolved, all related cases for all impacted employees are automatically closed and the impacted employees are emailed with the resolution.

Secure Case Management

PeopleSoft HR HelpDesk enables your HR organization to securely track and handle the most sensitive of HR employee relations issues while protecting the privacy of sensitive

Related Products

For more information on related applications, refer to product datasheets on the following:

- PeopleSoft Workforce Communications
- PeopleSoft Human Resources
- Oracle e-Business Suite HR

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employee information, reducing liability, and ensuring HIPAA compliance. Those features include:

- **Caller Verification and Validation** allows HR agents to verify callers by leveraging workforce personal profile information populated on the Employee 360 Degree View page.

  This provides the information needed to validate the caller's identity before collecting sensitive HR data.

- **Case Security** allows for cases that contain sensitive information.

  HR agents can mark the case as "secured", which limits access and visibility to that case to only the group or individual assigned to the case.

- **Case Visibility** allows you to configure whether case details are for external or internal viewing only.

- **Grievance Support** allows HR agents to identify the employee who is reporting the issue and who it is being reported against.

  Application security ensures that the person against whom the case is being reported cannot access the case in self-service, and the case does not appear in that person's 360 Degree View.

- **Single Sign-On** for HR agents to have immediate access to the PeopleSoft HR HelpDesk, PeopleSoft HR, e-Business Suite HR, and 3rd party systems.

This comprehensive case management functionality supports the need for longer-term management and resolution, which is often associated with complex or sensitive issues. Notes and attachments allow you to keep a complete history of all interactions.

Empower HR Subject Matter Experts with Insights and Fluid Approvals Driven Knowledgebase Management

The knowledgebase content accessible by your employees through self-service can either be created by your HR organization or they can leverage content that already exists such as posted company policies and procedures. Your HR administrators, subject matter experts, and HR specialists can develop rich text content with relevant links, and post solutions for known employee questions to HR self-service pages.

Solution Management Insights

The Solution Management Insights dashboard is designed for HR subject matter experts and provides a quick view of any new and in-review solutions so they can complete the required details and post the solutions to employees. In addition, data visualizations such as the Solution Library helps the HR subject matter expert maintain the quality of solutions to make sure solutions are properly categorized and searchable.
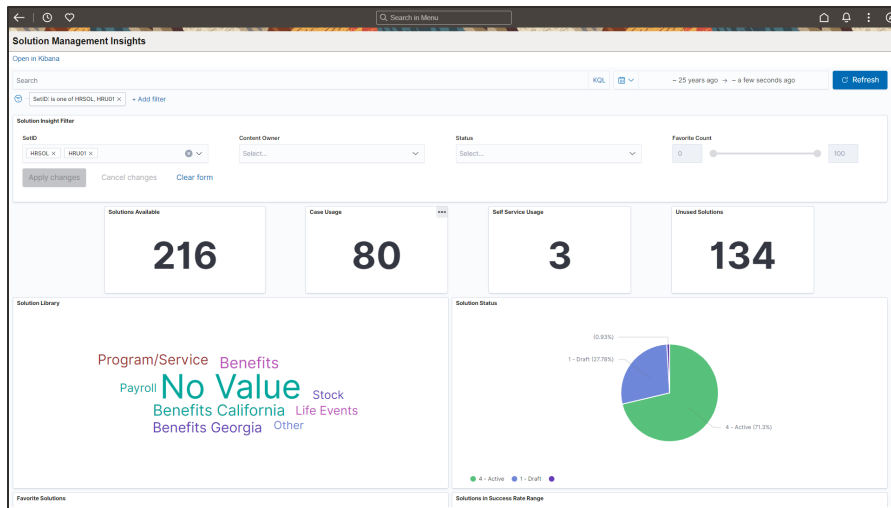
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Figure 11. HR HelpDesk Solution Management Insights Dashboard for HR Subject Matter Experts or Content Owners, HR Administrators

Streamline Solution Authoring Process with Fluid Approvals

The knowledgebase content can be maintained by HR administrators and knowledgebase managers using the robust fluid approvals capabilities to create new solutions or update existing solutions. This capability allows you to manage your solution review process within PeopleSoft.

Configure Knowledgebase with Criteria like Employee's Work Site, Role, and More

Knowledgebase content can be segmented and secured based on configurable criteria such as an employee's work site, home location, and/or role with the organization to produce faster and more refined self-service knowledgebase search results. As a practical example, the knowledgebase content is easily configured so that an employee in Germany who is searching for benefits enrollment information does not have to sift through US-based benefits content.

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