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PeopleSoft

PeopleSoft CRM 9.2: Application Fundamentals

August 2023

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PeopleSoft CRM 9.2: Application Fundamentals
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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	Description
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For **Alt+W,** hold down the **Alt** key while you press the **W** key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (	).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

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

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

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific

- Europe

- Latin America

- North America

Industry Identifiers

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

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.

- Managing hosted Online Help.

- Managing locally installed PeopleSoft Online Help.

PeopleSoft CRM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

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Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with PeopleSoft Customer Relationship Management Applications

PeopleSoft CRM Application Fundamentals Overview

This book contains essential information describing the setup and design of PeopleSoft CRM and the use of features that are common to multiple applications within PeopleSoft CRM, including information on:

- Setting up installation, basic system tables, and security options.

- Setting up and using features that are common to multiple PeopleSoft CRM applications, such as notes, alternate character, interactive reports, and diagnostic reports.

- Administering worker information.

- Setting up and using interactions and 360-degree views.

- Setting up and using self-service applications.

- Managing relationships with customers.

- Setting up agreements and warranties.

- Managing the portfolio of products that you offer.

Note: This book documents the mechanics of setting up and using common PeopleSoft CRM functionality. The use of that functionality within a business process, such as order capture or support, is discussed in the application product documentation.

PeopleSoft CRM Cross-Product Integrations

PeopleSoft CRM applications integrate with each other and with other external systems. Application-specific integrations are discussed in the application-specific product documentation. The following integrations apply to multiple products:

- Integration with PeopleSoft Human Capital Management (PeopleSoft HCM) or other similar systems enables you to synchronize CRM employee records with the system of record for human resources (HR) data.

- Integration with Oracle E-Business Human Capital Management (Oracle E-Business HCM) or other similar systems enables you to synchronize CRM employee records with the system of record for HR data. CRM HelpDesk for Human Resources now offers integration with E-Business Human Capital Management.

- Integration with PeopleSoft Supply Chain Management (PeopleSoft SCM) or other similar systems enables you to synchronize customer and product data across systems, which enables many transactions within PeopleSoft CRM, such as manage materials in PeopleSoft Integrated FieldService and PeopleSoft Support and order taking and tracking in PeopleSoft Order Capture.

- Integration with PeopleSoft SCM and Financial Management Solutions (FMS) enables you to display billing information and payment information that is associated with customers in the PeopleSoft CRM 360-Degree View.

- Integration with the PeopleSoft business analysis modeler enables you to view realtime multidimensional interactive reports that help you analyze and monitor the key performance indicators in your enterprise.

- Integrations that enable the PeopleSoft CRM system to exchange customers with personal information managers such as Microsoft Outlook.

- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support and the PeopleSoft collaborative selling applications.

Refer to the implementation topics in this product documentation for detailed information.

PeopleSoft CRM Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks based on the features that you are implementing. Setup tasks include:

- A list of components that you must set up.

  This list is the order in which you must setup the components and enter data into them

- Links to the corresponding product documentation.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the Business Object Management product documentation, with information about where to find the most current version of each.

Also, see product documentation for *PeopleTools: PeopleCode API Reference*.

Chapter 2

Working with Business Units and TableSet Controls

Understanding Business Units in PeopleSoft CRM

This topic discusses:

- Business unit structure.

- Uses of business units in PeopleSoft CRM.

Business Unit Structure

A business unit represents an operational entity for an application. The structure of a business unit depends on the requirements of the PeopleSoft CRM application in which the business unit is defined. For example, you might structure a sales organization (and thus the PeopleSoft Sales CRM business units) on region lines but structure a support organization (and thus the PeopleSoft Support CRM business units) around different product lines.

Using business units enables you to group transactions for reporting purposes. Business units do not have predetermined restrictions or requirements. You can define business units to reflect departmental functionality, along product lines, or by location. An entire organization might have only one business unit if every department uses the same processing rules. Diversified companies, such as those that have multiple cost centers, divisions, or subsidiaries, usually have multiple business units.

PeopleSoft does not deliver predefined business units. You decide how to implement business units in PeopleSoft applications to reflect the structure of the enterprise. Business units are usually specific to individual applications: for example, you set up field service business units for the PeopleSoft Field Service application and Sales business units for the PeopleSoft Sales application. However, some applications can share business units. For example, PeopleSoft Support and PeopleSoft Help Desk are both call center applications and can use the same business unit because the nature of their applications is similar.

You can also relate business units across integrated applications. For example, you can associate call center business units with field service business units for service order integration and with sales business units for sales lead integration.

Warning! After you define a structure, you cannot delete a business unit—you can only inactivate it. Before creating and securing business units, think carefully about how you want to set up the organizational structure and about what information you want groups of users to access.

Uses of Business Units in PeopleSoft CRM

Transactional data in PeopleSoft CRM is associated with business units. For example, leads belong to PeopleSoft Sales business units, and service orders belong to PeopleSoft Field Service business units.

Business units can control the following types of processing:

- Business logic.

  Some features are enabled and disabled at the business unit level rather than at the application level. For example, PeopleSoft Field Service enables automatic receiving by business unit.

- Reporting and analysis.

  You can report and summarize information by business unit. For example, several reports that are in PeopleSoft Support and PeopleSoft HelpDesk filter data based on business unit.

- Default values.

  Values often appear by default for every transaction that is associated with a business unit. For example, the currency value appears by default for each Sales business unit.

- Filtering of values for prompt fields.

  Prompt fields on PeopleSoft transactions components are often populated differently based on business unit. For example, in PeopleSoft Support you might set up one business unit to handle software issues and another to handle hardware issues. The values that are available to each business unit for the case type and product fields differ depending on whether the business unit that handles the case is set up for software or hardware cases.

- Security.

  Business units enable you to control row-level security. You can control access to setIDs by user or permission list.

  See Setting System-Wide Security Options.

Use of Business Units by CRM Applications

You can use the same business unit across applications. You create the business unit in one application, then use each application's setup component to associate the business unit with each application that uses the business unit.

See Defining Business Units and TableSet Controls.

Related Links

PeopleSoft Integrated FieldService
"Defining PeopleSoft Marketing Business Units" (PeopleSoft Marketing)
"Defining Call Center Business Units" (PeopleSoft Call Center Applications)
"Defining Order Capture Business Units" (PeopleSoft Order Capture Applications)
"Setting Up Business Units for PeopleSoft Sales" (PeopleSoft Sales)

Understanding TableSet Controls in PeopleSoft CRM

This topic discusses:

- TableSet control terminology

- TableSet control scenarios

- TableSet control example

TableSet Control Terminology

The TableSet control architecture uses the following terminology:

TableSet

TableSets are groups of control tables that enable you to share the same control values among multiple business units. This reduces data redundancy by enabling multiple business units to access shared information while keeping information such as departments decentralized. You can use business units and TableSets to associate a business unit with individuals in the enterprise or to specify default values for a business unit's transactions.

TableSets also enable you to limit data access by associating the business unit with a list of record groups, each of which is associated with a setID. The setID in turn is associated with one or more values that are in a control table.

SetID

SetIDs are the labels that identify a TableSet. SetID functionality in PeopleSoft CRM provides a higher business level for rollup of business unit data in reports and for other purposes. Just as business units organize the company or organization, setIDs organize data within the system.

Business units are used to group and filter transactions, and setIDs are used to group and filter the setup data. To create logical groupings of values, you associate setIDs with each value.

For example, you might have two call center business units, one for U.S. operations and one for European operations. If you sell different products in the U.S. and Europe, then you use two setIDs with the products: one for U.S. products, and one for European products. You can associate these different product setIDs with the two call center business units to ensure that call center agents in each geographic region see only products that are sold in that region. You can also use setIDs to group the different case types that are handled by the call centers.

Some PeopleSoft tables (control tables and prompt tables) use a setID as a high-level key to identify and retrieve data from system databases. The setID segregates the data in the control tables, which enables many business units to share the same set of data on the physical table in the system by grouping values for filtering purposes.

SetIDs are shared across applications. For example, all PeopleSoft CRM business units have TableSet controls that determine valid products for each business unit. Therefore, when you establish product setIDs, you need to consider how products appear in each PeopleSoft CRM application that you plan to implement.

Control (or Setup) Table

Control tables enable you to establish values for fields that are in transactional pages. For example, the Case Type control table contains all the valid case types. When a support agent opens a case, the Case Types table supplies the list of valid types from which the support agent can select.

Record Group

Record groups contain similar setup tables. For example, some record groups are specific to call center setup tables. There is one record group for the tables that contain problem attributes (case type, category, and so forth), another record group for tables that contain impact attributes (priority and severity), and so on. Additional record groups control setup tables (for example, products and solutions) that are shared with other applications.

Setup components in the same record group must use the same setID for a given business unit. For example, suppose you have two different business units with two different setIDs and you also want to separate case type by setID. Because case type is in record group RC-03 and category, type, and details are also in that record group, you must also assign different setIDs for category, type, and details if you have different setIDs for different case types.

When a record is in a given record group, views that contain the record are also in the record group if the views are keyed by setID. Related language records do not necessarily appear in the record group.

PeopleSoft-delivered setup tables are already organized into record groups. Not all record groups are relevant to all business units. For example, case attribute record groups are relevant to call center business units, but not to sales business units. You can look at the TableSet definition for an existing business unit to see which record groups are used by which application.

TableSet Controls

TableSet controls associate business units with record groups and setIDs. Each business unit has its own TableSet control, which is stored on the TableSet Record Group Control table. You can associate a setID for each individual record group to a business unit.

You can use either a business unit or a setID to set up PeopleSoft CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Note: The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term set control field.
Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See *PeopleTools: Application Designer Developer's Guide* and *PeopleTools: Lifecycle Management Guide*.

TableSet Control Scenarios

Not every organization needs to use the more complex TableSet control capabilities. Consider these scenarios as you decide how to use TableSet controls:

• You have only one business unit.

All of the setup data is valid for that business unit. Therefore, you only need one setID. When you create the business unit, specify this setID as the default. The system creates the TableSet control.

• Multiple business units use all the same setup data.

All of the setup data is valid for all business units. Therefore, you still only need one setID. When you create business units, specify this setID as the default for all business units, and the system creates TableSet controls.

- Multiple business units use separate sets of setup data.

  In this scenario, you have one set of setup data for each business unit. Therefore, you need one setID per business unit. As you create each business unit, you specify its default setID. Once again, the system creates TableSet controls for you.

- Multiple business units use some shared setup data and some unique setup data.

  This is the only scenario in which you have to configure the TableSet controls. The business units use different setIDs for different record groups, and therefore the default setID is not valid for all record groups. You still specify a default setID when you create each business unit, but you must override the default later.

TableSet Control Example

The following diagram illustrates the most complex TableSet control scenario: multiple business units use some shared setup data and some unique setup data.

The diagram represents the business units and setIDs that are established by an organization with three call center business units, one for its U.S.-based help desk operations, one for its U.S. support operations, and one for its European support operations.

The organization has these requirements for sharing setup data:

- There are two sets of case problem attributes (record group RC_03): one for the two support business units and one for the help desk business unit.

- There is one set of case impact attributes (record group RC_04); all three business units share the values.

- There are two sets of communication channel attributes (record group RC_07): one set for the U.S.-based business units and one for the European business unit.

This diagram illustrates the tables that manage the relationship between business units, record groups, and setIDs:

This diagram illustrates the tables that manage the relationship between business units, record groups, and setIDs.
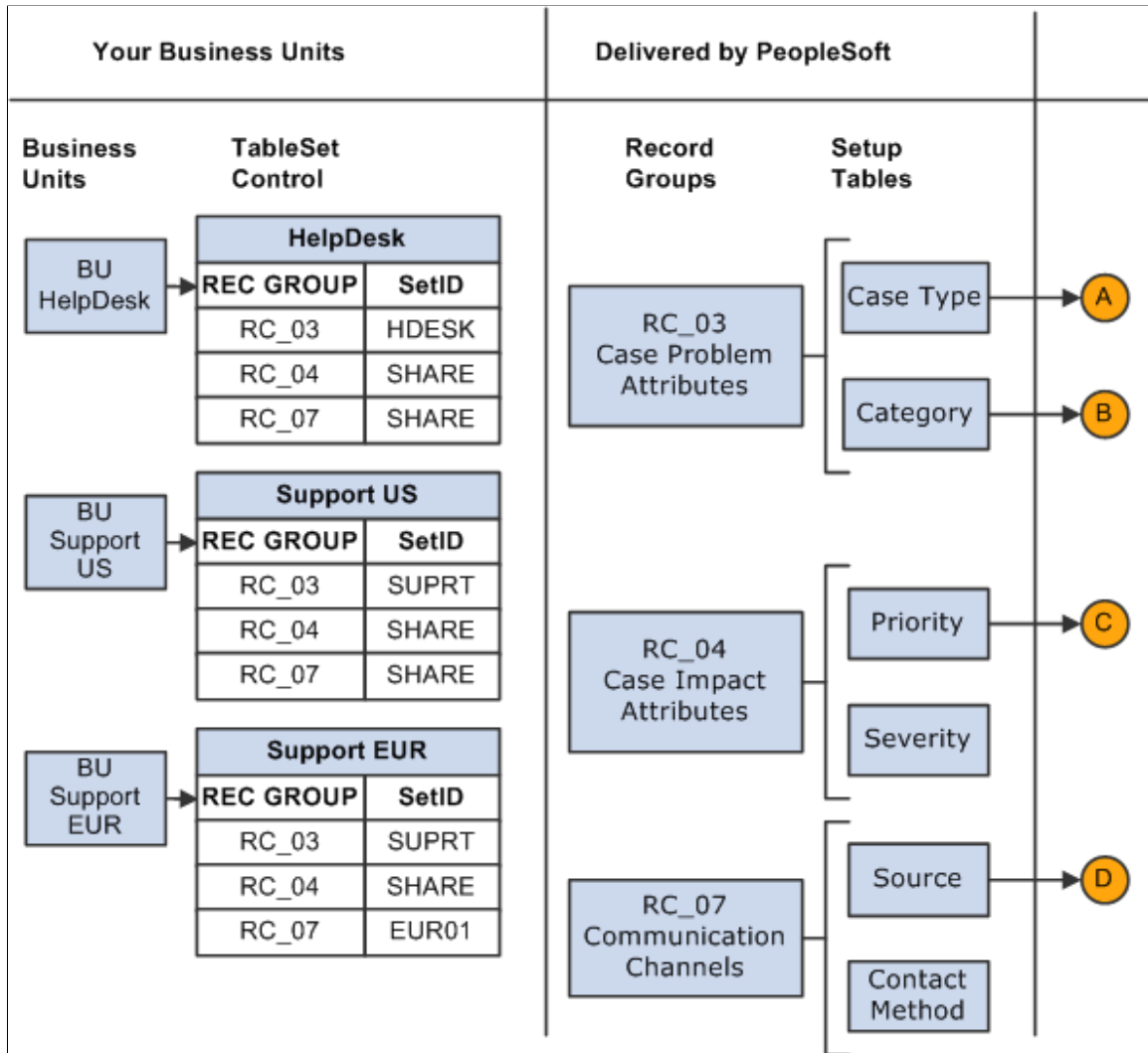
This diagram illustrates the tables that manage the relationship between business units, record groups, and setIDs (continued):
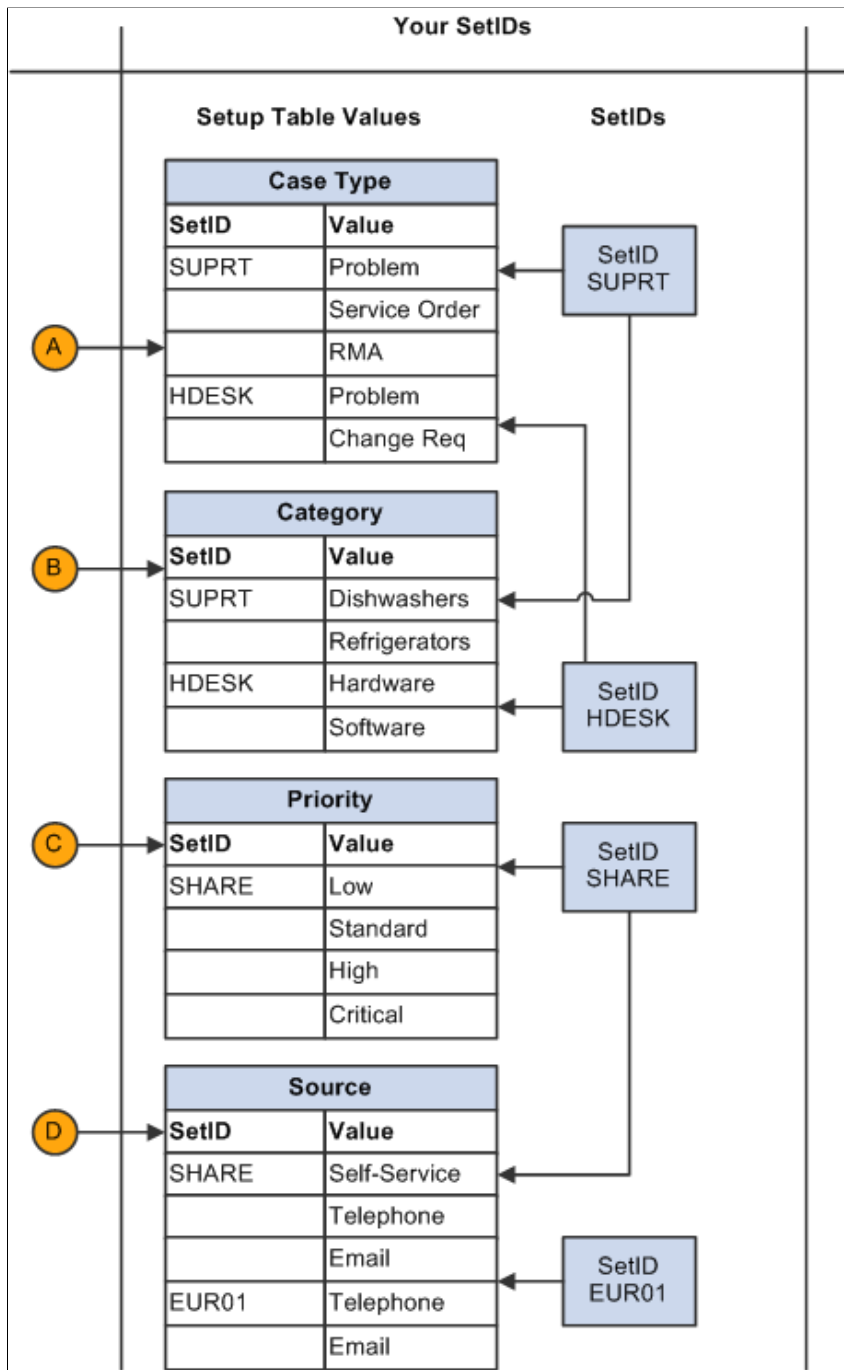
Notice the following details in the diagram:

- Values that are valid for more than one setID are entered for each setID for which they are valid.

  For example, both the help desk business unit and the support business units have a case type of *Problem.* The different business units cannot share this value because they are associated with different setIDs. Therefore, the problem case type is set up twice in the Case Type table: once under the HDESK setID, and once under the SUPRT setID.

Setting up case types is simple, involving only a setID, a unique identifier, and descriptive information. But for more complex setup tables (for example, the product table), duplicate data becomes difficult to maintain. The more complex the setup tables are, the more you have to gain by sharing values across business units.

- The Case Type table is part of the record group for case problem attributes (RC_03). Therefore, the values for all tables that are in the RC_03 record group are split into help desk values (associated with the HDESK setID) and support values (associated with the SUPRT setID).

- The preceding diagram illustrates two different ways of handling setIDs when values are shared by some, but not all, business units:

  - You can have setIDs that correspond to the specific groups of values, as the setup for the record group for case problem attributes (RC_03) illustrates: there is one setID for the support business unit and another setID for the help desk business unit.

  - You can use a general-purpose setID, such as SHARE, for shared values and use other setIDs on an exception basis, as the setup for the communication channels record group (RC_07) illustrates.

- The system uses the default SETID table to determine default values for the setIDs that are associated with each record group in a new business unit. For example, a setID US100 might use US100 for most setIDs but use SHARE for departments. If you define US100 as the default setID for the a new business unit, then the new business unit also uses US100 for all setIDs except departments, for which it uses SHARE.

Defining Business Units and TableSet Controls

To define tablesets, use the TableSet ID (SETID_TABLE) component.

This topic provides an overview of the TableSet control setup process and lists the pages used to define TableSet controls.

Pages Used to Define Business Units and TableSet Controls

Page Name	Definition Name	Usage
Call Center BU Page	BUS_UNIT_RC1	Create a call center business unit and its default setID.
FieldService Business Unit Page	BUS_UNIT_RF1	Create a field service business unit and its default setID.
Marketing Definition Page	RA_BUS_UNIT_TBL	Create a marketing business unit and its default setID.
Internal (order capture definition) Page	BUS_UNIT_RO1	Create an order capture business unit and its default setID.

Page Name	Definition Name	Usage
Quality Definition Page	RQ_BUS_UNIT_TBL	Create a quality business unit and its default setID.
Sales Definition Page	RSF_BUS_UNIT_TBL	Create a sales business unit and its default setID.
Define Change Management Page	BUS_UNIT_TBL_RG	Create a change management business unit and its default setID.
Online Marketing Definition Page	BUS_UNIT_TBL_RY	Create a change management business unit and its default setID.
TableSet ID Page	SETID_TABLE	Create a setID.
TableSet Control Page	SET_CNTRL_TABLE1	Review and modify a business unit's TableSet control (which setID is used for which record group).
Record Group Page	REC_GROUP_TABLE	Review the records that are included in a record group.

TableSet Control Setup

When you create a new business unit, the system creates a setID with the same name as the business unit. The newly created TableSet control associates all record groups with that setID. This is a convenient shortcut when you have multiple business units with identical or similar TableSet controls.

This diagram illustrates the TableSet control setup process.

This diagram illustrates the TableSet control setup process.
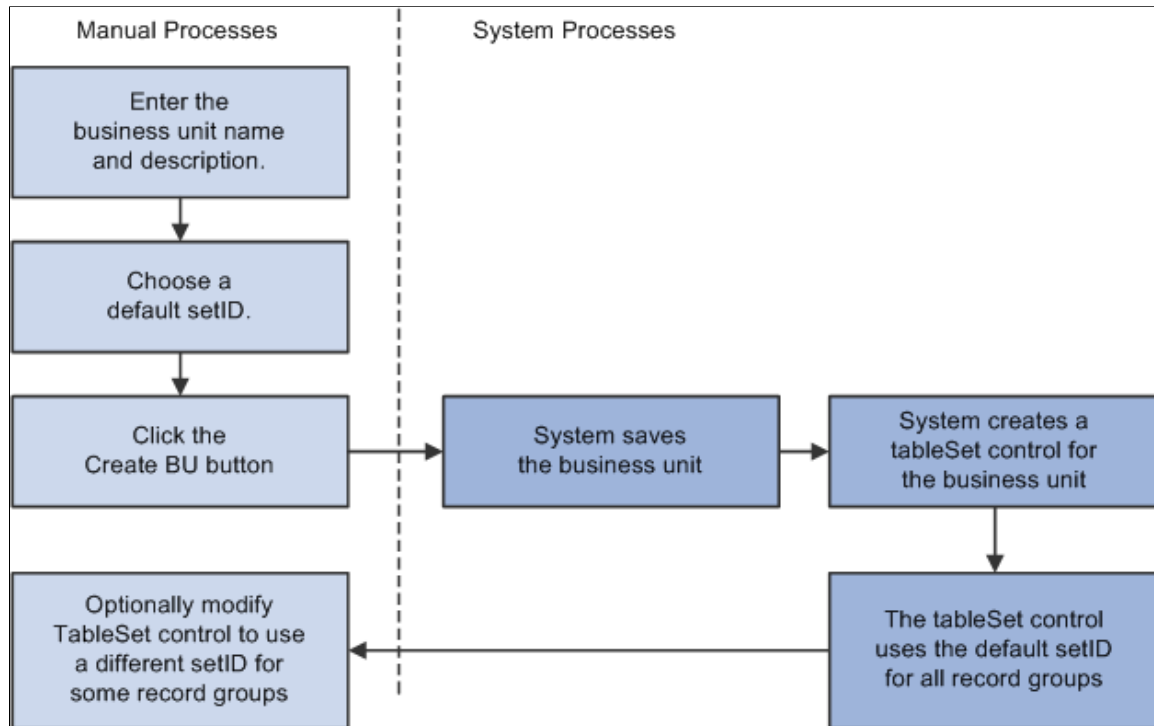
To define a business unit's TableSet control:

1. Create the business unit on the appropriate application-specific page.

    The system creates a default setID corresponding to the business unit name.

    If the business unit uses only its default setID, you are finished; continue to the next step only if the business unit uses setIDs that are other than its defaults.

2. Use the TableSet Control page to create additional setIDs.

3. Use the Record Group page (in the TableSet Control component) to map setIDs to record groups.

If necessary, use the Record Group page (in the Record Group component) to review which records are in each record group.

In addition to setting up business units and setIDs, you must set up appropriate security.

See Understanding PeopleSoft CRM Security.

Note: The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term *set control field*.
You can use either a business unit or a setID to set up PeopleSoft CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.
Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See the following product documentation:

- *PeopleTools: Application Designer Developer's Guide*

- *PeopleTools: Getting Started with PeopleTools*

Chapter 3

Setting Up General Options

Understanding PeopleSoft CRM General Options

This topic discusses:

- Automatic numbering.

- Installation options.

- Regions.

PeopleSoft CRM general options are the basic control values that apply to multiple PeopleSoft CRM applications.

Automatic Numbering

The system can automatically generate unique numeric identifiers for many PeopleSoft CRM objects by tracking the last number used and increasing the number by one for each new object. Autonumbers come from several sources: autonumbering rules, last numbers, and PeopleTools global unique identifiers (PeopleTools GUIDs).

If you need to autonumber in increments that are greater than one, use the `GetNextNumberWithGapsCommit()` function.

Autonumbering Rules

When you set up autonumbering rules, specify number prefixes and set the length of the identifier. You can use different rules for different setIDs.

Depending on how you set up autonumbering, duplication of numbers between business units can occur. For example, suppose that you use PeopleSoft Computer/Telephony Integration (PeopleSoft CTI) and callers key in a number, such as a service order ID, that is generated through autonumbering rules; you must set up autonumbering to ensure that the number is unique across all business units.

To review which objects use autonumbering rules, review the number types that you can select on the Auto Numbering page.

See Setup Auto Numbers Page.

SetIDs and Autonumbering

Certain objects that are not keyed by business unit or setID are hard-coded to use rules that are set up under the SHARE or NONE setIDs. In this case, if you set up an autonumbering rule for any of these objects under a regular setID (for example, CRM01), the system uses the rule of the setID that is hard-coded to this object when it assigns the next number to a new record. As a result, the autonumbering rule of the NONE setID, not CRM01, is used.

Last Numbers

Enter only the last number that the system uses to create new identifiers. For each object that uses this method, PeopleSoft delivers a row of data in the Last Number table (PS_RC_LAST_NBR_TBL). You can review the data and change the starting number, but that is the only necessary setup.

Numbers are not associated with setIDs, which means that the numbers are guaranteed unique across the system.

To review which objects use last numbers, review the data that appears on the Last Numbers page.

See Last Number Setup Page.

Last Number Types

PeopleSoft delivers PeopleSoft CRM with a set of last number types and a predefined Last Number table which includes the last number types that are required for the core PeopleSoft CRM applications. When you add PeopleSoft CRM applications for specific vertical markets, you must add last number types for objects used by those applications to avoid system errors that result from the object having no entry in the Last Number table.

For example, the following error might occur:

While trying to create the Time Header record, an error has occurred. If the error continues to happen, contact your Systems Specialist. RC_CASE.BUSINESS_UNIT.SavePreChange (Record PeopleCode).

To resolve this error, add the last number type, TIME_SHEET_ID, for the SHARE setID (or the specific setID that you have defined).

See Understanding PeopleSoft CRM General Options.

PeopleTools GUIDs

GUIDs are used only where the number is not visible online; there is no setup associated with these objects. For instance, business object IDs use GUIDs.

Installation Options

Installation options include system settings for PeopleSoft CRM products that you installed. The system options that you set determine:

- Which PeopleSoft CRM products you are using.

- Defaults for system options and data, such as country, market, and exchange rate calculations.

    See Calculating Currency Exchange.

- The standard work week used to determine the start and end time of holidays and to determine worker availability for assignments.

    See Calendar Options Page.

- The character set that the system uses for languages whose symbols are not easily represented by a single-byte code.

See Understanding Alternate Character.

- What data is available to the HR HelpDesk application.

  See "Understanding Enterprise Integration Technology" (Business Object Management).

- How different applications perform contractual pricing and billing.

  See Establishing Pricing Records.

Regions

You can associate regions with customer and worker addresses, provider groups (as part of the group assignment criteria), sales territories, and product definitions.

See Setting Up Regions.

Setting Up Automatic Numbering

To set up automatic numbering, use the Automatic Numbering (AUTO_NUM_PNL) component.

This topic discusses how to set up autonumbering rules.

Pages Used to Set Up Automatic Numbering Rules

Page Name	Definition Name	Usage
Setup Auto Numbers Page	AUTO_NUM_PNL	Define automatic numbering for objects that use numbering rules.
Last Number Setup Page	RC_LAST_NBR_TYPE	Specify last numbers for objects that use last numbers in autonumbering.

Setup Auto Numbers Page

Use the Setup Auto Numbers page (AUTO_NUM_PNL) to define automatic numbering for objects that use numbering rules.

Navigation:

Set Up CRM > **Common Definitions** > **Codes and Auto Numbering** > **Automatic Numbering** > **Setup Auto Numbers**

This example illustrates the fields and controls on the Setup Auto Numbers page.

Note: If you have PeopleSoft Integrated FieldService installed and you are setting up autonumbering for service order IDs (SO_ID), you must also set up autonumbering for timesheets, material IDs and manage expenses IDs or you will receive an error message when using the application.

Field or Control	Description
SetID	Displays the setID that controls the numbering rules. A few objects are hard-coded to use either the SHARE or NONE setID. See Automatic Numbering.
Number Type	Displays the type of object whose rules you are setting up or displaying.
Field Name	Displays the field where the number is stored—for most objects, this is the object identifier. The system enters the appropriate field name based on the number type.
Length	Displays the length of the field, so that you are sure that the numbers that you generate are not too large for the field.
Start Seq (start sequence)	Enter a prefix that is placed in front of the number. The prefix can contain up to three alphanumeric characters. A start sequence of three zeroes ("000") indicates that no prefix is used. **Note:** PeopleSoft CTI requires that all user inputs are either all numbers or all letters, but not a mix. Certain autonumbered fields that PeopleSoft CTI users enter (for example, IDs for orders, service orders, and customers) normally can contain a mix of numbers and letters, but if you use PeopleSoft CTI, give these fields autonumbering definitions that use just one or the other.
Max Length (maximum length)	Enter the maximum length of the number. This cannot exceed the length of the field.

Field or Control	Description
Last Number Issued	Enter the last number issued. Automatic numbering begins with the next number.
Default?	Select the autonumbering rule to use by default when the start sequence is not specified. If more than one row of autonumbering rules exists, you can activate only one as the default.

Last Number Setup Page

Use the Last Number Setup page (RC_LAST_NBR_TYPE) to specify last numbers for objects that use last numbers in autonumbering.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Last Number Setup > Last Number Setup

This example illustrates the fields and controls on the Last Number Setup page.

Note: Not all rows that appear on the Last Number Setup page appear here.

Field or Control	Description
Object Type	Displays the objects for which you can set up autonumbering. The installation process creates a row for each object whose numbering you manage on this page.
Record (Table) Name and **Field Name**	Enter the table and field name of the object.
Last Number	Enter the last identification number that is in use for this object. Automatic numbering begins with the next number. The numbers from 0 to 20000 are reserved for delivered data.
↻	Click the **Test** icon to increase the last number by one and test the autonumbering functionality.
Add a New Last Number Type	Click this button to select a new last number type from a list of last number types. When you add a last number type, you must specify the **Object Type**, **Record (Table) Name**, and **Field Name** with which it is associated.

Setting Up PeopleSoft CRM Application Installation Options

To set up PeopleSoft CRM Application Installation Options, use the Installation Options (RB_INSTALLATION) and Manufacturer (MANUFACTURER) components.

Pages Used to Set Up PeopleSoft CRM Application Installation Options

Page Name	Definition Name	Usage
General Options Page	RB_INSTALLATION	Set up the applications that you are using and enter other general options.
Calendar Options Page	RF_INSTALLATION	Set up the standard workday and workweek for the enterprise at the time of installation.
Alt Character Page	ALT_CHAR_PNL	Set up the alternate characters that the system uses for a specific language code.
Billing and Pricing Options Page	RB_INTEGRATION	Select options for contractual billing and pricing.
Manufacturers Page	MANUFACTURER	Set up manufacturers for asset integration.

General Options Page

Use the General Options page (RB_INSTALLATION) to set up the applications that you are using and enter other general options.

Navigation:

Set Up CRM > **Install** > **Installation Options** > **General Options**

This example illustrates the fields and controls on the General Options page (1 of 2).

This example illustrates the fields and controls on the General Options page (2 of 2).

Use the General Options page (RB_INSTALLATION) to specify information for credit card transactions.

Navigation:

Set Up CRM > **Install** > **Installation Options**

This example illustrates the fields and controls on the General Options page (1 of 2).

This example illustrates the fields and controls on the General Options page (2 of 2).

Field or Control	Description
Country	If no Country value is defined in the credit card extension's *Country* field, the system uses this value.
Credit Card Verification Number Required	If this check box is selected, then the Credit Card Service extension will require the entry of a valid credit card verification code before it will successfully process a credit card transaction.
Hosted Payment Integration	If selected hosted payment options, the system takes the input from each component and transfers control of the transaction to a third-party hosted site, CyberSource. Users are then transferred within the current browser window to the card processor's site during checkout where they will enter their card data for approval.

There are three major areas of risk in electronic payment transactions: collection of data, storage, and transmission. In this regard, customers are seeking ways to mitigate the risk of security breaches in all areas. Many credit card payment processors provide solutions that allow merchants (customers) to redirect their customers to the suppliers' hosted web pages for the purpose of collecting and processing the electronic payment information, thereby avoiding much of the PCI compliance issues around collection, transmission and storage of sensitive credit card data. This feature integrates the Online Marketing (OLM) Dialog Execution Server (DES) with the CyberSource Hosted Order Page (HOP). HOP refers to the third-party where payment processing takes place. This allows a dialog to be presented to a consumer, allowing the consumer to provide payment as part of the dialog flow. The payment process

takes place on a third-party system, which returns receipt details to OLM. Only receipt details are stored in the PeopleSoft database; sensitive data like credit card information will not be stored in the PeopleSoft system.

This enhancement allows PCI compliant payments from Online Marketing dialogs such as Event registration.

See CyberSource Hosted Order Page User's Guide and PeopleSoft Enterprise Customer Relationship Management 9.2 Installation Guide.

PeopleSoft Products

This section displays the PeopleSoft applications that can be installed in the database. Select the applications that are already installed in the system.

Product Options

Field or Control	Description
Higher Education	Having Higher Education check box enabled assigns the Higher Education Sales display template for Sales Lead & Opportunity components. For more information please refer "Higher Education for Sales" (PeopleSoft Sales)
Offer Management	With this option enabled, whenever the offer status is changed to completed/ready for use, a detailed offer message is triggered to the third party system with the details of the completed offers.
Oracle Data Librarian	This product works in association with Oracle Customer Data Hub product (CDH). Select this check box to enable the Oracle Data Librarian as a licensed product. This allows PeopleSoft CRM users to initiate requests to merge duplicate customers. These requests are sent to the CDH Data Librarian's queue for evaluation.
Third Party Optimization	We allow customers to integrate to a third party optimization engine for automated, real-time, self-learning offers. Third Party Optimization option must be selected when using a third party engine to retrieve offer recommendations.

General Options

Field or Control	Description
Country	Enter the country code for the installation.

Field or Control	Description
Exchange Rate Type	Enter the exchange rate that you are using for this PeopleSoft installation.
Market	Select the market for which PeopleSoft CRM is licensed. This is *Global,* unless you license one of the industry applications. In that case, use the market that is applicable to that industry.
Agreement Renewal Lead Time	Enter the number of days that you want the system to use to notify you when agreement need to be renewed.
Collector/Credit Analyst Req. (collector/credit analyst required)	Select this check box to make the **Collector/Credit Analyst** field a required field.
360-Degree Search Context	Select this option to control the behavior of the 360-Degree View search page. When you select this option, business object information from the 360-Degree View search page remains in system memory. The system uses this information to bypass the search page and retrieve the same business object information the next time the user accesses the 360-degree view as long the current user session is active and the interaction for that business object is still open.

Credit Card Options

Field or Control	Description
Hosted or the SOAP payment integration	Hosted or the SOAP payment integration. If SOAP integration is selected then the Credit Card Verification Required checkbox is enabled, otherwise will be disabled. If you select Hosted Payment option, this discontinue storage of credit card information in all components and alter the user interface accordingly at transaction points and the Customer Data Model card maintenance page.

Field or Control	Description
Credit Card Verification Number Required	Select this option to make entering verification number mandatory when users enter credit card information as billing method for transactions such as cases, service orders, agreements, sales orders, and prepaid wireless services. The system generates an error message if this option is selected and a user does not provide a verification number prior to submitting credit card data. In the case of an order, it is put on credit card hold if the verification number is not present.

See Understanding Credit Card Verification Number Encryption.

HCM Competency Option

Field or Control	Description
Use Only Evaluation Type	If you use the Person Competency EIP to synchronize data with PeopleSoft Human Capital Management (PeopleSoft HCM), select the type of evaluation that is considered a valid competency profile.

Related Case Processing

Field or Control	Description
Number of Child Cases	Enter the value below which the Case Relationship AAF action will process the cascade in real time. If the number of child cases for a related case status cascade is equal to or more than the value specified in this field, the status cascade will be processed as a batch job.

Sales Options

Field or Control	Description
Allow Prospects	Select this option if you want to allow Sales users to enter prospects (potential customers and contacts that are not saved to the CDM) into the system. Prospect information is available only in the transaction for which it is created. See "Prospects" (PeopleSoft Sales).

Calendar Options Page

Use the Calendar Options page (RF_INSTALLATION) to set up the standard workday and workweek for the enterprise at the time of installation.

Navigation:

Set Up CRM > **Install** > **Installation Options** > **Calendar Options**

Note: You need to define work week information only if you want to create entries on worker calendars automatically when a service order is assigned.

This example illustrates the fields and controls on the Calendar Options page.

Field or Control	Description
Default Work Days	Select the check box for each standard workday.
Start Time and **End Time**	Enter the default start and end times for the workdays you selected.

Alt Character Page

Use the Alt Character page (ALT_CHAR_PNL) to set up the alternate characters that the system uses for a specific language code.

Navigation:

Set Up CRM > **Install** > **Installation Options** > **Alt Character**

This example illustrates the fields and controls on the Alt Character page.

See <u>Understanding Alternate Character</u>.

Billing and Pricing Options Page

Use the Billing and Pricing Options page (RB_INTEGRATION) to select options for contractual billing and pricing.

Navigation:

Set Up CRM > **Install** > **Installation Options** > **Billing and Pricing Options**

This example illustrates the fields and controls on the Billing and Pricing Options page.

Related Links

"Understanding Order Capture Setup" (PeopleSoft Order Capture Applications)

Establishing Pricing Records

Manufacturers Page

Use the Manufacturers page (MANUFACTURER) to set up manufacturers for asset integration.

Navigation:

Set Up CRM > **Common Definitions** > **Manufacturers** > **Manufacturers**

This example illustrates the fields and controls on the Manufacturers page.

Enter a short and long description of the manufacturer in the corresponding fields. Use this page only if you are setting up asset integration with PeopleSoft Financials. The manufacturers that you set up here appear as selections for the **Manufacturer** field on the Installed Product, Installed Asset, and Product Mapping for Hardware Assets pages.

Note: Certain setIDs, like SHARE, contain manufacturer data that is brought over from PeopleSoft Financials. For these setIDs, you cannot enter values for new manufacturers. In these situations, all values for new manufacturers for the setID must be defined on the FMS system and synchronized to CRM from that source. Manufacturer values are shown in read-only format on the CRM database for these setIDs.

Setting Up Regions

To set up regions, use the Region (RB_REGION) component.

This topic discusses how to set up regions.

Page Used to Set Up Regions

Page Name	Definition Name	Usage
Region Page	RB_REGION	Set up regions for use with various PeopleSoft CRM transactions.

Region Page

Use the Region page (RB_REGION) to set up regions for use with various PeopleSoft CRM transactions.

Navigation:

Set Up CRM > **Common Definitions** > **Location** > **Region Codes** > **Region**

This example illustrates the fields and controls on the Region page.

Field or Control	Description
Category	Select to indicate how PeopleSoft CRM references this region: • *Geography:* Use this region in addresses, provider group and worker assignment criteria, and pricing definitions. • *Product Sales:* Use this region in product definitions to define where the product is sold. • *Territory Assignment:* Use this region when defining territories in PeopleSoft CRM Sales.
Status	Select *Active* or *Inactive.*

Field or Control	Description
Region Type	Select a type that describes the basis for regional divisions. General-purpose types are *Country, Phone, Postal, Region,* and *State. Region* is the most generic value, used when none of the other values apply.
Parent Region ID	Enter the region ID for the parent of the region that you are entering. This field sets up the hierarchical relationship for regions and enables you to create parent and child relationships.
Region Hierarchy	Displays the entire regional hierarchy, including the current region.

Setting Up Locations

To set up locations, use the Location (LOCATION_TBL) and Location Timezone (RB_LOC_TIMEZONE) components.

This topic discusses how to set up locations.

Pages Used to Set Up Locations

Page Name	Definition Name	Usage
Location Definition Page	LOCATION_TBL	Define a physical location such as corporate headquarters, a branch office, or a remote sales office.
Location Detail Page	LOCATION_TBL2	Enter details for the selected location.
Location Timezones Page	RB_LOC_TIMEZONE	Associate locations with time zones.

Location Definition Page

Use the Location Definition page (LOCATION_TBL) to define a physical location such as corporate headquarters, a branch office, or a remote sales office.

Navigation:

Set Up CRM > **Common Definitions** > **Location** > **Location** > **Location Definition**

This example illustrates the fields and controls on the Location Definition page.

Field or Control	Description
Status	Select the status of this record as of the associated effective date: *Active* or *Inactive*.
Country	Select the country for the location. The system adjusts the other address fields based on the address format that is defined for the selected country.
In City Limit	If you provide data to a third-party tax provider, selecting this check box identifies the location as one that is subject to applicable city taxes.

Location Detail Page

Use the Location Detail page (LOCATION_TBL2) to enter details for the selected location.

Navigation:

Set Up CRM > Common Definitions > Location > Location > Location Detail

This example illustrates the fields and controls on the Location Detail page.

Field or Control	Description
Attention	Enter the name of the person whose name should appear in the **Attention** field for correspondence for the location.
Location Detail	Enter descriptive text about the location.

Location Timezones Page

Use the Location Timezones page (RB_LOC_TIMEZONE) to associate locations with time zones.

Navigation:

Set Up CRM > **Common Definitions** > **Location** > **Location time zone** > **Location time zone**

This example illustrates the fields and controls on the Location Timezones page.

Field or Control	Description
SetID	Enter the setID for the locations that you want to view.

Field or Control	Description
Location Code	Enter a full or partial location code for the locations that you want to view.
Show Unassigned Rows Only	Select to view only locations without a time zone.

Setting Up Address Formats and Values

To set up address formats and values, use the Country (COUNTRY_TABLE) and State (STATE_DEFN) components.

This topic discusses how to set up address information.

Pages Used to Set Up Addresses

Page Name	Definition Name	Usage
Country Description Page	COUNTRY_DEFN	Update country information.
Address Format Page	ADDR_FORMAT_TABLE	Specify formats for addresses so that they conform to the customary address format and conventions of the specified country.
State Page	STATE_DEFN	Add or review a state or province code. PeopleSoft delivers applications with fully populated state code tables (PS_STATE_TBL) and updates these tables as boundaries and designations change.

Country Description Page

Use the Country Description page (COUNTRY_DEFN) to update country information.

Navigation:

Set Up CRM > **Common Definitions** > **Location** > **Country and Address Format** > **Country Description**

This example illustrates the fields and controls on the Country Description page.

The PeopleSoft system contains fully populated country code tables (PS_COUNTRY_TBL). PeopleSoft updates these tables as national boundaries and designations change.

Field or Control	Description
2-Char Country Code (two-character country code)	Enter the value-added tax registration ID.
EU Member State (European Union member state)	Select this check box to use euro conventions to translate currencies for this country.

Address Format Page

Use the Address Format page (ADDR_FORMAT_TABLE) to specify formats for addresses so that they conform to the customary address format and conventions of the specified country.

Navigation:

Set Up CRM > **Common Definitions** > **Location** > **Country and Address Format** > **Address Format**

This example illustrates the fields and controls on the Address Format page.

Field or Control	Description
Available	Select to activate the corresponding address field and its label for inclusion as part of the standard address format for this country. When they are entering addresses, users enter a country code, and the system updates the page to display the fields that are appropriate for the specified country. **Note:** To hide the field for a given country, you must *both* clear the **Available** field *and* blank out the **Label** field.
Label	Enter field labels to configure the address format so that it conforms to the country's address requirements. For example, if you enter *Province* or *Department* in the state label field, this value appears as the label of the field on the address page instead of *State*.
Postal Search	Select this check box to activate postal searching functionality for Dutch, Japanese, or UK addresses. For the UK, when you select this check box, the system makes the fields that are in the PeopleSoft **GB Systems Information** group box available for entry.

GB (Great Britain) System Information

This group box is used for UK addresses. It displays only if you have the Information Management Toolkit installed and configured. With this GB Information Management application installed, you can look up UK addresses by entering a postcode and, optionally, a house name or number.

Field or Control	Description
National Registry Directory	Enter the location of the data files containing the postcode information.
Configuration File Prefix	Enter the location of the PeopleSoft-supplied configuration file (PS_GBSYS.INI).

State Page

Use the State page (STATE_DEFN) to add or review a state or province code.

PeopleSoft delivers applications with fully populated state code tables (PS_STATE_TBL) and updates these tables as boundaries and designations change.

Navigation:

Set Up CRM > **Common Definitions** > **Location** > **State**

This example illustrates the fields and controls on the State page.

The PeopleSoft system contains fully populated state code tables, complete with descriptions.

Field or Control	Description
Numeric Code	Enter a code for statistical and reporting purposes.

Important! You must enter a numeric code for states to display in the lookup for the **License Issued By** field in the Worker, Consumer, or Contact profile information.

Setting Up Salutation Codes

To set up salutation codes, use the Salutation Table (SALUTATION_TABLE) component.

This topic discusses how to set up salutation codes that are used in correspondence.

Page Used to Set Up Salutation Codes

Page Name	Definition Name	Usage
Salutation Code Page	SALUTATION_TABLE	Set up salutations for correspondence with customers.

Salutation Code Page

Use the Salutation Code page (SALUTATION_TABLE) to set up salutations for correspondence with customers.

Navigation:

Set Up CRM > **Common Definitions** > **Customer** > **Salutation Table** > **Salutation Code**

This example illustrates the fields and controls on the Salutation Code page.

Enter the code and descriptions for the salutation that you want to use in correspondence and with customers.

Defining Alpha Indexes

This section provides an overview and describes how to define alpha (alphabetic) indexes.

Page Used to Define Alpha Indexes

Page Name	Definition Name	Usage
Alpha Index Definition Page	RD_ALPHA_IDX_DEFN	Define alphabetic indexes that are used to filter a user's account list and contact list.

Understanding Alpha Indexes

Alpha indexes are primarily used by the Sales application. An alpha index enables users to quickly locate all customers whose names begin with a certain letter or sequence of letters, similar to using a rolodex. The alpha index appears on account management and contact management pages and consists of the letters of the alphabet, by default.

You can modify the default index and define different alpha indexes for each installed language. Additionally, you can assign different alpha indexes for each user.

Related Links
Sales Page

Alpha Index Definition Page

Use the Alpha Index Definition page (RD_ALPHA_IDX_DEFN) to define alphabetic indexes that are used to filter a user's account list and contact list.

Navigation:

Set Up CRM > **Common Definitions** > **Customer** > **Alpha Index Definition** > **Alpha Index Definition**

This example illustrates the fields and controls on the Alpha Index Definition page.

Field or Control	Description
UI Character	Enter the characters that identify this index on the user interface. For example, to define an index that encompasses the letters A through C, enter *A-C*.

Field or Control	Description
Search String	Enter the search characters, separated by commas. For example, to search for names beginning with the letters A, B, or C, enter *A, B, C.*

Setting Up Payment Terms

To set up payment terms, use the Payment Terms (RB_PAY_TERMS) component.

This topic describes how to set up payment terms.

Pages Used to Set Up Payment Terms

Page Name	Definition Name	Usage
Payment Terms Page	RB_PAY_TERMS	Define codes for payment terms and enter descriptive information and effective dates.

Payment Terms Page

Use the Payment Terms page (RB_PAY_TERMS) to define codes for payment terms and enter descriptive information and effective dates.

Navigation:

Set Up CRM > **Common Definitions** > **Customer** > **Payment Terms** > **Payment Terms**

This example illustrates the fields and controls on the Payment Terms page.

Add the setID and payment term ID when you are adding a new payment term. Then, enter an effective date, status, and long and short descriptions.

Defining Units of Measure

To define units of measure, use the Units of Measure (UNITS_OF_MEASURE) component.

This topic discusses how to define units of measure.

Pages Used to Set Up Units of Measure

Page Name	Definition Name	Usage
Unit of Measure Page	UNITS_OF_MEASURE	Define units of measure.

Unit of Measure Page

Use the Unit of Measure page (UNITS_OF_MEASURE) to define units of measure.

Navigation:

Set Up CRM > **Common Definitions** > **Unit Of Measure** > **Unit of Measure**

This example illustrates the fields and controls on the Unit of Measure page.

Field or Control	Description
Conversion Rate	Enter a conversion rate to use as the default conversion rate between the unit of measure shown at the top of the page and the unit of measure listed in the **Convert To** field. The system automatically calculates the inverse conversion rate.

Related Links

"Defining and Maintaining Items" (PeopleSoft Product and Item Management)

"Understanding Item Definition in PeopleSoft CRM" (PeopleSoft Product and Item Management)

Setting Up Data Archiving

Data archiving enables you to improve system performance by using online storage for only those transactions that users are likely to access. Other transactions are archived.

Archiving is performed in the PeopleSoft Data Archive Manager using archive templates that are defined for PeopleSoft CRM tables. This is a list of the archive templates that are defined in PeopleSoft CRM:

Object	*Template*
Interactions	RI_INTER
Leads	RSF_LEAD
Orders	RO_HDR1
Quotes	RO_HDR1
Marketing Lists	RA_LIST
Chat Logs	RB_CHAT
Call Center Worklist Entries	WL_CASE
Case	RC_CASE
Business Projects	RC_BP
Service Order	RF_SO_HR

See *PeopleTools: Data Management* product documentation.

Chapter 4

Setting Up Security and User Preferences

Understanding PeopleSoft CRM Security

This topic discusses:

- Security building blocks.

- Security terminology.

- PeopleTools security.

- Application security.

- Distributed security.

Security Building Blocks

This diagram provides an illustration of the different layers of security that are delivered in the PeopleTools and Customer Relationship Management security infrastructure. This topic will cover each of these security building blocks to assist you in implementing the security needed for your enterprise.

This diagram provides an illustration of the different layers of security that are delivered in the PeopleTools and Customer Relationship Management security infrastructure.
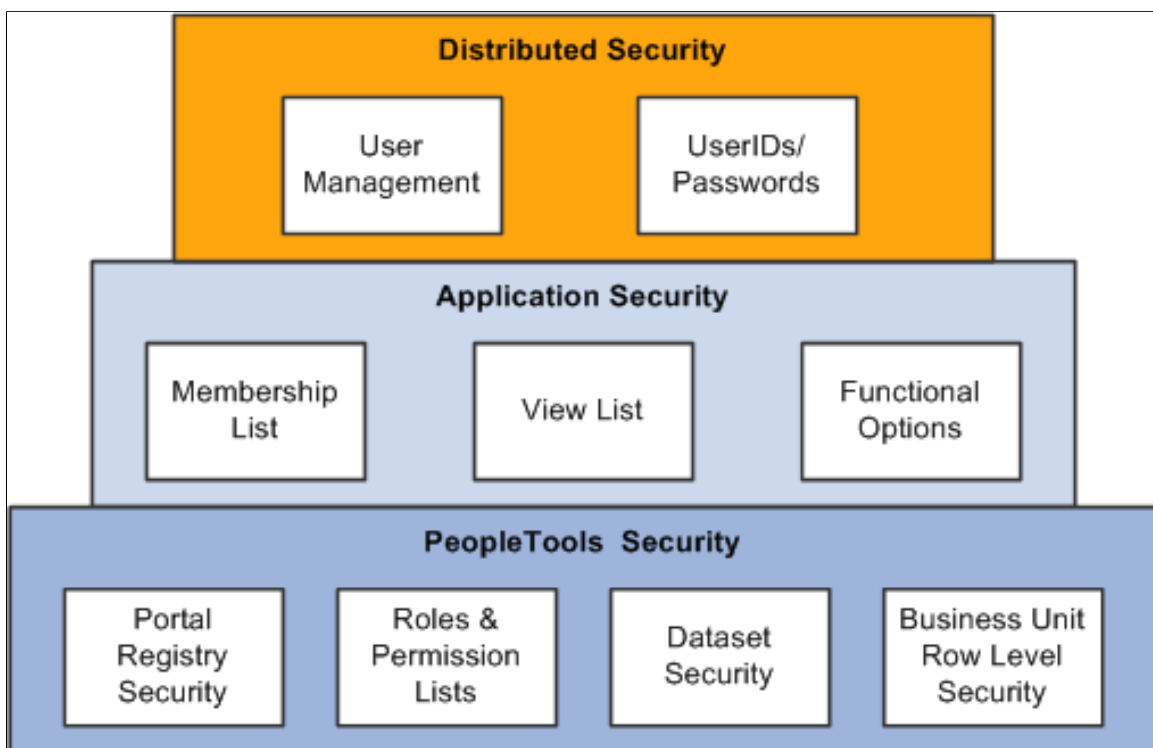
PeopleTools security controls row-level access to transactions. For example, you would use dataset security to enable a sales representative to see leads as the lead owner, or to enable a sales manager to view leads as manager, and so on.

Application security provides three key elements of CRM security: memberships lists, view lists, and functional options. Membership lists can define the characteristics of one or a group of users whose system and data access must be secured. View lists can define the characteristics of one or a group of objects (for example, customers) that a member group has view privileges to. Functional options restrict the user to a set of allowable actions within a secured transaction.

Distributed Security or Delegated administration enables you to set up administrators that are external to your enterprise so they can give other users system access, within the confines of the permissions that you allow the administrator to grant.

Security Terminology

Before you can fully enable security, you must understand the security terms and functions at each level of the system:

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system	Operating system	Controls access to the database.
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups that are used in application development.
Query	PeopleTools	Defines the set of table rows that a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Restricts access to a subset of data rows within tables to which the user has authority.
Permission list level	PeopleSoft applications	Enables PeopleSoft application security.

PeopleTools Security

Use PeopleTools security to define roles and permissions. PeopleSoft delivers a set of roles out of the box that you can use to set up role-based access to PeopleSoft transactions. PeopleSoft provides a recommended set of roles and permissions with each of the products delivered. You can add or modify new or existing roles and permissions to fit your business requirements.

This topic discusses

- Portal registry.

- Roles and permission lists.

- Dataset security.

- Business unit row level security options.

- Preferred markets and security.

Portal Registry

The portal registry is a set of dedicated PeopleSoft database tables that store every content reference, typically a URL, available through the portal. A portal registry has a tree-like structure in which content references are organized, classified, and registered. A portal registry contains folders and content references. Folders group and organize content references into a multilevel hierarchy. Except for the root folder, each folder has a parent folder, and each folder can contain content references as well as other folders. Content references are objects that have been registered in the portal registry.

There are several ways to access and maintain the portal registry:

- Use the registration wizard to register content references, assign security, and update.

- Use the Menu Import feature to upgrade custom menu group definitions.

- Use portal administration pages to add, change, or delete folders and content references from a portal registry.

- Use the portal registry application programming interface (API) for programmatic access to the registry.

- Use the security synchronization process to update the portal registry security based on the menu and script security.

    See *PeopleTools: Portal Technology* product documentation.

Roles and Permission Lists

Permission lists are the building blocks of user security authorizations. You typically create permission lists before you create user profiles and roles. When defining permission lists, however, consider the roles and user profiles that you will use them with. Recall that roles are intermediary objects between permission lists and users. You use roles to assign permissions to users dynamically. Permission lists may contain any number of permissions, such as sign-in times, page permissions, and component interface permissions. Permission lists are more flexible and scalable when they contain fewer permissions.

Dataset Security

Dataset security controls row-level access to transactions. Dataset security is achieved by associating the definition of a dataset to the search definition for transactions that have multiple dataset rules. PeopleSoft dataset security framework may be used to build dataset rules and assign the dataset rules to PeopleTools roles.

PeopleSoft delivers a set of dataset security rules that may be used to secure transaction rows. PeopleSoft CRM uses dataset security for data searches to restrict transaction rows.

It is also used in these applications and functions:

- PeopleSoft Sales (leads and opportunities).

- PeopleSoft Order Capture (quotes and orders).

- Calendar and Task Management.

- PeopleSoft Marketing (audience and marketing programs).

Business Unit Row-Level Security Options

You can implement security to prevent individual users or roles from accessing specific rows of data that are controlled by key fields. Likewise, you can restrict users so that they can access only a specific subset of rows. For example, you might set the user ID security for a call center agent in Paris so that the agent can access only the data that is for a particular European business unit. If you have a team of call center agents in Paris, you could add them all to a role and then use role security to give them all the same access to the system.

A user can belong to multiple roles and use the menu items that are assigned to all of those roles.

Note: You cannot define row-level security attributes by combining roles. In PeopleTools, you designate row-level security for a user by selecting a row-level security role. The row-level security attributes for the role that you select become the security attributes for the user.

This table describes the consequences of row-level security when you use different combinations of system security options and roles:

System Security	Role of User ID	Row-Level Security
No security	The user ID is not linked to a role.	Not applicable. All users can access every object because you have not implemented security.
User-level security	The user ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. You can link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then the user has access to menu items but not to any application pages with key fields that are enabled for row-level security.
Permission list-level security	All users in a permission list have the same level of security.	Users are limited to the key fields that are specified by the permission list that is assigned to their user IDs.

You must define the users or roles that have access to specific business units and setIDs. For example, you might give a particular role access to only one business unit. When a user in the role enters prompts for business units (for example, when entering data that has business unit as the primary key), the available selections include only the business units for which the user has been granted authority. The user's available data has been filtered through one or more levels of security.

The number of users that are assigned the same level of security is a key factor in determining whether you base security on user IDs or roles. If a large number of users have identical access requirements, consider using roles. By assigning the users to a single role, you can make subsequent changes to access requirements once rather than many times.

Preferred Markets and Security

The preferred market that is associated with a user ID controls the data and functions that a user can access. Preferred markets are of two types: industry and geographic.

If a user's preferred market is geographic, the user can only access functionality and data that are valid for business units in the geographic region or country. For example, a country might require certain information about imports that users in another country would not need to enter.

If the user's preferred market is by industry, the user is granted access to only the functionality and data that are implemented for those industries.

See:

- Overall Preferences Page

- "Understanding Portal Technology" in Peopletools Portal technology product documentation.

- *PeopleTools: Security Administration*

Application Security

This topic discusses:

- Enterprise administration.

- CRM application security terminology.

- Application security framework.

- Security objects.

- Dynamic and static membership lists.

- Dynamic and static view lists.

- Implicit view lists.

- Functional options.

- Functional option groups.

- Functional options conflict resolution.

- Enabling functional options.

- Business object search system processing.

- Catalog security.

- How security is processed at runtime.

Enterprise Administration

Application Security consists of three main pieces: membership lists, view lists and functional options. Using PeopleSoft CRM application security, enterprise administrators have the ability to:

- Define the community of participants for which security is restricted (membership list)

- Define a set of business processes or actions that a participant in the membership group can perform.

CRM Application Security Terminology

This table lists terms related to security:

Term	Definition
Security Object	An object or entity that is being secured.
Membership List	Characteristics of one or a group of users whose system and data access must be secured. The list ultimately contains a list of members.
View List	Characteristics of the viewing object (for example, customers) that are secured from the membership list. The list ultimately contains a list of objects.
Functional Options	A unique code that defines what someone can do within a transaction.
Functional Option Group	A grouping of functional options.
Security Profile	A template that defines the view lists and functional options. A security profile is given to one or multiple membership list domains.
Transaction	A primary business activity like creating orders, leads, opportunities, cases, service orders, and campaigns.
Security List Record	A table that stores the results of the security domain queries or the static list.

PeopleSoft CRM Application Security Framework

PeopleSoft CRM application security framework is a characteristic-based security framework that enables PeopleSoft customers to secure data and functions within a transaction.

Use PeopleSoft application security to abstract customers as security objects. The characteristics that define the group of customers are called lists.

You can predefine the objects and lists as either membership or view to differentiate viewers from the target transactions or data objects.

Note: Application security is used only to secure objects (person, customer, product catalog, hold codes, performance metrics, and so on) and not transactions (orders, leads, opportunities, cases, and so on). Objects in this context mean setup data or data that is used to create a transaction.
PeopleSoft CRM does not deliver an application security feature for securing customers from user roles. To make this work, you would have to customize the security criteria in the Business Object Search adapter definition and then make some minor coding adjustments.

Application security involves setting up and defining:

- Membership lists

  Membership lists define the characteristics of one or a group of users to whom system and data access and functional permissions and privileges are granted. Users in a security membership list definition are associated with a security profile.

- View lists

  View lists define the characteristics of the viewing object (for example, customers or product catalogs) that are secured from the membership list.

- Functional options

  Functional options define the functions (for example, order submission) that can be carried out by members of a membership list.

- Security profiles

  Security profiles define the combination of view lists and functional options that make up a specific profile of view and function access. Security profiles are given to members belonging to a membership list.

This illustration represents a high-level view of a security profile using PeopleSoft CRM Application Security.

This illustration represents a high-level view of a security profile using PeopleSoft CRM Application Security.
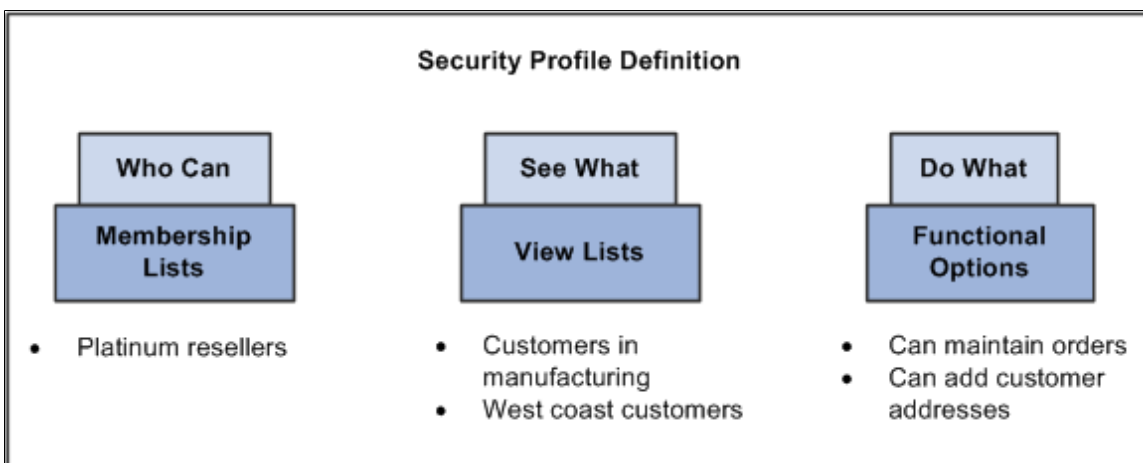
Security Objects

PeopleSoft delivers a number of security objects that you can use to implement security. You should not, however, change them in any way. Any changes that you make to the security objects delivered by PeopleSoft impact the security profiles and the security list tables. PeopleSoft recommends that you limit the number of security objects that you create and are careful how you use them.

PeopleSoft delivers these membership type security objects:

Security Membership Object	Security Object Type	Industry
Customer	Membership	Order Capture
Person	Membership	All
Role	Membership	All

Dynamic and Static Membership Lists

A dynamic membership list is a saved query of characteristics that result in a list of members for a membership list object. The queries are saved using the dynamic criteria definition that is linked to the membership list object.

If the domain type is dynamic, you can edit the membership criteria using the appropriate dynamic criteria definition. You can also view the results of the membership list.

You may associate the membership list to any security profile currently available in the system. Once you associated the membership list with a security profile, that security profile appears in the security profile list for the membership list. When needed, you can remove the association of the membership list to the security profile.

Static membership lists contain a specific list of members that you may associate with any security profile currently available in the system.

Dynamic and Static View Lists

A dynamic view list is a saved query of characteristics that results in a viewable list of objects. You set up a view list object similar to the way you set up a membership list object. After you establish a view list, you may grant one or more view list objects (dynamic or static) to a security profile.

Note: Not all objects can be used as view list objects.

PeopleSoft delivers these View List Security Objects as system data:

View List Security Object	*Security Object Type*	*Application*
Catalog	View List	Order capture
Customer	View List	All
Hold Code	View List	Order capture
Performance Metric	View List	Marketing

Implicit View Lists

A dynamically defined view list can contain a bind variable or a criteria that is not resolved at the time of creation of the query but is resolved at runtime. This is called an *implicit* view list.

To set up an *implicit* view list, you must use the Configurable Search Setup - Search Fields page to select the *bind* variable for the security components and fields that you want to use on the Add View List or Add Membership List pages.

You can modify the Customer Search (RSEC_CUSTOMER_SRCH) component to use bind variables and create *implicit* view lists.

See "Understanding the Configurable Search" (Automation and Configuration Tools).

Functional Options

Functional options are defined independently of security objects and domains. Functional options let you determine what a user you can do within an application. For example, you can create functional options that enable users to submit orders or add new customers. To group view lists and functional options, you define a security profile. The security profile is then granted or associated to one or multiple membership lists.

Functional Option Groups

Functional option group is a grouping of functional options, which you can be associated with a security profile. Using functional option groups can make maintaining security profiles easier and more efficient.

Enterprise administrators that must make wholesale changes to security profiles can simply change the functional option group associated with the security profiles that must be changed or updated.

Functional Option Codes

Functional options enable the enterprise administrator to define the functions that users can access within a transaction. Functional options codes are evaluated at run time by the transaction that is evaluating the functional option.

PeopleSoft delivers these functional options codes out of the box when you install and implement PeopleSoft CRM:

Functional Option Code	Description	Application/Function
CORE_RSF_FCAST_ROLLUP	Forecast will begin in rollup; otherwise it begins in summary.	Sales
CORE_RSF_FCAST_SIMPLE	Forecast simple reduces options presented to the forecast user.	Sales
CORE_RSF_ADVANCED	Controls basic versus advanced mode for lead and opportunity components.	Sales
CORE_RSF_AUTO_ASSIGN_OFF	Controls the ability to automatically assign a lead or opportunity at save in add mode.	Sales
CORE_RSF_DEFAULT_OWNER	When lead or opportunity is in add mode at save time, the current user is assigned as the primary sales rep by default. If revoked, then leave lead or opportunity unassigned.	Sales
CORE_RSF_SEARCH_PRODUCT_GROUP	Enables the end user to search for product group on leads and opportunities.	Sales
CORE_RSF_SHOW_SITE	Controls the ability to add a site to a lead or opportunity.	Sales
CORE_RSF_SUMMARY	Control the display of the summary page in lead and opportunity.	Sales
OVERRIDE_IBU	Override Inventory BU	Order Capture

Functional Option Code	Description	Application/Function
RO_MAX_DISCOUNT_PERCENT	Maximum discount percent.	Order Capture
RO_MAX_ORDER_TOTAL	Maximum order total reached.	Order Capture
RO_MAX_SURCHARGE_PERCENT	Maximum surcharge percent.	Order Capture
RO_MIN_MARGIN_PERCENT	Maximum profit margin percent.	Order Capture
SEARCH_ALL_PRODUCTS	When searching for products in Order Capture, this functional option give the user the ability to search for any products that are defined in the system instead of limiting them to the products that are defined in a catalog.	Order Capture
MKTHIDE	Hides marketing fields.	Marketing
MKTDISP	Makes marketing fields display-only.	Marketing
RC_CHOOSE_DIRECT_REPORT	Choose Direct Report	Call Center
RC_ON_BEHALF_OF	On Behalf of	Call Center
RC_SLA_DETACH	Enables user to clear a service level agreement.	Call Center
RTM_EDIT_TASK	Edit task functional option.	Task Management
QC	Provides access to Quick Create.	Business Object Search

Functional Options Conflict Resolution

Conflicts can happen due to the granting of the same functional options within a single security profile or multiple security profiles. To resolve conflicts the system uses these rules:

- If one functional option group grants an option and another revokes it, the revoke takes precedence. If the options are not in the same scenario, the option is granted. Revoke is for the functional option itself. (for example, do you have authorization for transfer money). If one functional option group says yes and another no, conflicts are resolved based on how the revoke options are set up.

- For amounts there is a conflict resolution called max amount wins. This means that if one functional option group gives a user access to 2000 USD and another functional option group give a user access to 3000 USD, and the max amount win option is selected, the user gets access to 3000 USD.

Enabling Functional Options

The display template framework enables you to configure functional option security for your pages. By referencing the functional option on a button or field within the display template, the functional option security is enabled.

See "Understanding Display Templates" (Automation and Configuration Tools).

Business Object Search System Processing

The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page. The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.

The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.

For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results set for the role. The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

See "Adding and Modifying BO Search and Quick Create Definitions" (Business Object Management).

Catalog Security

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft enables you to define the layout and content of online catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

For Order Capture there is a functional option code called SEARCH_ALL_PRODUCTS. When searching for products in Order Capture, this functional option will give users the ability to search for any products that are defined in the system, instead of limiting the search to the products that are defined in a catalog. You must group this option into a functional option group. You would then associate it to a membership list in the security profile.

Security Memberships allow you to specify which users or groups of users can have access to certain catalogs. For example, a company can have a Membership List called All Persons that includes all of the people that have a person record in the system. This Membership List is then associated with a catalog.

This means that all of the people on this list can view this catalog. If a catalog called the Premier Catalog was for Premier Customers, a company can create a Membership List that contains all of their Premier

Customers and the Premier Catalog would provide special pricing and recommendations for this group of users.

Note: PeopleSoft CRM does not support role-based catalogs, nor do we support role-based access to customers. The system can handle this type of functionality but you will need to customize your CRM application. The only area where you can use a role-based membership list, without customizing your application, is to control the Order Capture hold view list. The other area where you can use the role membership list, without customizing your application, is to control display logic in conjunction with a display template.

See "Defining Catalog Content and Permissions" (PeopleSoft Product and Item Management).

How Security Information is Processed at Runtime

PeopleSoft CRM application security uses several Application Engines and APIs (application programming interfaces) at runtime to help ensure that the customers to whom you have granted security have access to the correct information and customers.

Here are the elements of runtime security that are activated when a user, or customer attempts to access the PeopleSoft CRM applications that you have secured.

- Application Engines

    - RSEC_DAEMON

        Polls for application updates (for example, when a customer is added or updated) and triggers the RSEC_BUILDER

    - RSEC_BUILDER

        Handles the writing of secure objects to list tables.

- Runtime API

    - Determines security memberships and view lists.

    - Generate SQL filters for calling applications

    - Determines functional options, and functional option resolution.

- Definitional API

    Provides application programming interface to add and update security framework metadata.

PeopleCode Application Classes and SQL views provide the API to the security framework. This API is provided for impacted applications to access and update the application security framework. The API is used at runtime to evaluate membership and view privilege result sets, but there are some access methods that are provided to update the framework keys, membership, and view privilege tables directly. The API encapsulates all functionality and structure related to the security framework, so that calling applications do not need to understand the inner workings of the framework.

These access methods are an overview of how each of the impacted applications requirements are satisfied through the API.

- API Based Direct Data Access

  This access method is provided for instances where the membership tables contain all of the relevant data for the calling application. This method produces a result rowset based on the underlying security object definition. In this usage there are three known values and one unknown value. The three known values consist of a membership security object type, a view list object type, and either a membership object ID, and or a view list membership object ID. Based on the ID that is provided, the API determines the security profiles that are associated to the known entity, and from the profiles determines the data that is to be provided as a result set. The API returns this data in a rowset based on the security object's list record.

- API Based SQL Data Access

  This access method is provided for instances when the results in the membership table need to be merged or joined in a larger SQL statement that is being constructed by the calling application. The known values and the method of data retrieval are the same as the direct data access method, the result of this call is a SQL select statement that returns the keys of the rows of the security object's table. This SQL statement can be used in a SQL *IN* clause or correlated sub query to limit the results of the calling application's constructed query.

- SQL/Query Based Data Access

  There may be instances in which the API cannot be used. An example of this is any time where the logic to determine a result set does not have the ability to run a PeopleCode based API, such as a standard PeopleTools prompt, a view, or a PeopleTools query. For these use cases the design provides example SQL that can be used to join the security data model.

- Functional option Conflict Resolution

  In instances where a key resolves the same functional option multiple times with different properties, the conflict needs to be resolved. Gathering the functional options and privilege overrides is possible using a SQL UNION, but the resolution of the rules is not possible within a single SQL select statement. This requires impacted applications to be in an environment where it is possible to run PeopleCode to determine the applicable functional options. Because of this functional options are not be determined or executed in a view or query type access method.

- Executing Functional Options

  An abstract class/interface is provided to model functional option classes. This class is used by the runtime application to run the functional option logic. The runtime class provides access to the logic that is relevant to the application and coded in the attached application class. The class also provides the ability to access the functional option amount value, operator, base currency, and perform currency conversion if required. The runtime API provide a method to pass multiple functional option codes, and execute them. A calling application's framework could leverage this to provide data driven execution.

- Update to Data Cache

  Applications that are responsible for the security objects' secured data require access to update the security cache when a change is made. Since it is possible that a configurable search definition references any data for a given object, all additions and updates to these objects trigger a cache refresh. The known values in this case are the security object type, and security object ID. The API triggers the data caching process providing the known values as parameters. These parameters trigger the caching process to deal only with data that is relevant (for example, the specific object ID).

- Update to Security Framework

    This access method is provided for instances where it is required to update the security framework data directly in a batch or EIP type mode. The API provides access to create membership, view privilege, functional option, and security key objects. The system provides methods to create the associations between the various security objects, and keys. Security Object types (for example, customers) cannot be created through the API. Since there is not a lot of business logic tied to the security setup components, the API uses SQL objects to update the framework tables directly rather than building component interfaces.

Note: To improve runtime performance, the result sets for static and dynamic membership and view privilege domains are cached into database list tables. Dynamic implicit domains are cached by spawning security keys for each member in the domain. An Application Engine process provides the mechanism for creating the cache tables that store the membership and view privilege lists.

Setting System-Wide Security Options

To set up system-wide security options, use the Security Options (SECURITY_OPTIONS), Security View Names (SECURITY_VIEW_NAMES), Apply Security (APPLY_SECURITY), Security SetID Class (SEC_SETID_CLS), Security SetID Operator (SEC_SETID_OPR), Security Business Unit Class (SEC_BU_CLS), Security Business Unit Operator (SEC_BU_OPR), Operator Defaults (OPR_DEFAULT), Role Worker (RB_ROLE_WORKER), Security Views (SECURITY_VIEWS) components.

This topic provides overviews of row-level security views, sensitive worker information, and predefined security roles and sample users.

Pages Used to Set System-Wide Security Options

Page Name	Definition Name	Usage
Security Options Page	SECURITY_OPTIONS	Select the type of security to implement (user or permission list) and the key fields that are controlled by the security settings.
Apply Security Setups Page	RUN_FIN9001	Initiate the process that activates the selected security options.
Security View Names Page	SECURITY_VIEWS	Define the type of security for each view in the system. The Apply Security Setups process changes the security view names to match the levels of security for each view. These names use the file extensions for the corresponding security type.
Business Unit Security by Permission List Page	SEC_BU_CLS	Grant access to a business unit by using a permission list.

Page Name	Definition Name	Usage
Business Unit Security by User ID Page	SEC_BU_OPR	Grant access to a business unit by using a user ID.
TableSet Security by Permission List Page	SEC_SETID_CLS	Grant access to a tableset using a permission list.
TableSet Security by User ID Page	SEC_SETID_OPR	Grant access to a tableset by using a user ID.
Overall Preferences Page	OPR_DEF_TABLE_RB1	Define overall preferences for a specified PeopleSoft user.
Call Center Page	OPR_DEF_TABLE_RC	Define preferences for call center agents and other users of the Case component.
Sales Page	OPR_DEF_TABLE_RSF	Define preferences for sales representatives.
Change Management Page	OPR_DEF_TABLE_RG	Select user default values that you want the system to display on the Change Request page in PeopleSoft HelpDesk.
Account Page	OPR_DEF_TABLE_RSP	Select default values that you want the system to use when it does account assignments.
Secure Worker Role Page	RB_ROLE_WORKER	Define user roles that can access sensitive and semi-sensitive worker information.

Understanding Row-Level Security Views

Business units and setIDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to the values that are defined for the edit table. With PeopleSoft row-level application security, you can specify which values in the edit table are available in a particular view.

Views enable you to access data horizontally for multiple tables. Views are Structured Query Language (SQL) statements that filter out data rows. Users with permission to access particular setIDs or business units see only a subset of the values in the edit tables.

After you set up views, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from particular roles.

Security View Names

PeopleSoft delivers applications with security views that apply to key fields in the system. You can alter these views or build views of your own; however, they would be considered a customization. View names include suffixes that reflect the type of security for the view. This table lists the view name suffixes and describes the corresponding security type.

View Name Suffix	Security Type
NONVW	No security.
OPRVW	User security.
CLSVW	Permission list security.

Note: Although PeopleSoft generally follows this naming convention, the system does not enforce it. As long as you have the view defined in the security view names grid the view name will work.

Row-Level Security for Users

After you select security options and set up security view names, define the security-controlled field values that each user or permission list can access. When you secure key fields in the application, the pages that you use depend on the level of system security that you select. If you select user-level security, use the user security pages. If you select role-level security, use the permission list security pages.

Understanding Sensitive Worker Information

PeopleSoft uses enterprise integration points to transmit worker data from PeopleSoft Human Capital Management (PeopleSoft HCM) to PeopleSoft CRM. Most of the data that PeopleSoft CRM subscribes to from PeopleSoft HCM is sensitive.

Some users, however, should not have access to this data. To give users access to sensitive and semi-sensitive data, you must select the roles that are associated with the users and then indicate what type of information is available to them—either confidential or home contact information.

Users who have sensitive (confidential) data access defined in the Secured Worker Role setup page, can view date of birth, age, national ID, gender, and employee status fields in the Worker and Case components; otherwise, the system hides this information. Users who have semi-sensitive data (home contact) access can view home address, home phone, home email, and home pager fields for a worker.

If a role doesn't have access to sensitive or semi-sensitive data, then all users belonging to the role cannot view the associated fields on the pages in the Worker and Case components.

Warning! When users have access to sensitive or semi-sensitive data, the system enables them to edit some pages. If a user modifies a field in PeopleSoft CRM, the changes could be overwritten the next time that a PeopleSoft HCM message is transmitted to PeopleSoft CRM because the information comes to PeopleSoft CRM through a one-way transmission from PeopleSoft HCM.

Related Links

Understanding Provider Groups and Group Members

Predefined Security Roles and Sample Users

PeopleSoft provides several roles with predefined user profiles and permission lists in the demonstration database. You can use these sample security configurations as they are delivered, or you can modify them to meet your specific security requirements. The roles and permissions are part of the system data, and the users are part of the sample data delivered in the demonstration database.

This topic discusses:

- PeopleSoft CRM system IDs.

- PeopleSoft HelpDesk and PeopleSoft Support user IDs.

- PeopleSoft Integrated FieldService user IDs.

- PeopleSoft high tech industry user IDs

- PeopleSoft government industry user IDs

- PeopleSoft Marketing user IDs.

- PeopleSoft Sales user IDs.

- PeopleSoft Order Capture user IDs.

- PeopleSoft Order Capture Self Service user IDs.

- PeopleSoft Quality user IDs.

- PeopleSoft multichannel applications user IDs.

PeopleSoft CRM System IDs

PeopleSoft delivers predefined user IDs, passwords, and associated roles for PeopleSoft CRM.

Note: To look up role information for a user ID, select **PeopleTools** > **Security** > **User Profiles** > **User Profiles** and then click the Roles tab.

This table lists the delivered PeopleSoft user IDs and passwords:

User ID and Password	*Description*
SYSADM	System Administrator
EMPL	Employee
MGR	Line Manager

PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, and PeopleSoft Support User IDs

This table lists the predefined user IDs and passwords for PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, PeopleSoft HelpDesk for Higher Education, and PeopleSoft Support:

User ID and Password	Description
CCAG	Call Center Agent
CCMGR	Call Center Manager
CRAWLING / WELCOME	HR Call Center Level One Agent USA (E-Business HCM)
FKELLY / WELCOME	HR Call Center Level Two Agent UK (E-Business HCM)
HELPAA	Help Desk Applications Administrator
HELPAG	Help Desk Agent
HELPMGR	Help Desk Manager
HHDCAN_ADMIN	HR HelpDesk Administrator (Canada)
HHDCAN_AGT1	HR HelpDesk Agent 1 (Canada)
HHDCAN_AGT2	HR HelpDesk Agent 2 (Canada)
HHDCAN_AGT3	HR HelpDesk Agent 3 (Canada)
HHDCAN_MGR	HR HelpDesk Manager (Canada)
HHDUSA_ADMIN	HR HelpDesk Administrator (USA)
HHDUSA_AGT1	HR HelpDesk Agent 1 (USA)
HHDUSA_AGT2	HR HelpDesk Agent 2 (USA)
HHDUSA_AGT3	HR HelpDesk Agent 3 (USA)
HHDUSA_MGR	HR HelpDesk Manager (USA)

User ID and Password	*Description*
HSCOTT / WELCOME	HR Call Center Level One Agent UK (E-Business HCM)
KADDAI / WELCOME	HR Call Center Level Two Agent USA (E-Business HCM)
MBORHO / WELCOME	HR HelpDesk Administrator (E-Business HCM)
RJAMES / WELCOME	HR Self-Service Manager (E-Business HCM)
SMARTHA / WELCOME	HR Self-Service Employee (E-Business HCM)
SOLTNMGR	Solution Manager
SSS_AA00100	Higher Education Worker and Student
SSS_CONST	Higher Education Constituent
SSS_FACULTY	Higher Education Faculty Worker
SSS_FAO	Higher Education Financial Aid Officer
SSS_FUND	Higher Education Fundraiser
SSS_HEADMIN	Higher Education Administrator
SSS_HEAG1	Higher Education Level One Agent
SSS_HEAG2	Higher Education Level Two Agent
SSS_HEBLENDAG	Higher Education Blended Agent (IT and non-IT cases)
SSS_ITAG	Higher Education IT Agent
SSS_MKTMGR	Higher Education Marketing Manager
SSS_MKTR	Hgher Education Marketer
SSS_MKTR1	Higher Education Marketer

User ID and Password	Description
SSS_REC	Higher Education Recruiter
SSS_REC1	Higher Education Recruiter
SSS_REC2	Higher Education Recruiter
SSS_REC3	Higher Education Recruiter
SSS_RECMGR	Higher Education Recruiting Manager
SUPPAA	Support Applications Administrator
TECHSPEC	Technical Specialist

PeopleSoft Integrated FieldService User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Integrated FieldService:

User ID and Password	Description
DISPATCH	Dispatcher
FSAA	Field Service Applications Administrator
FSAG	Field Service Agent
FSENG	Field Service Engineer
FSMGR	Field Service Manager
INVAG	Inventory Agent
INVMGR	Inventory Manager
PRODMGR	Product Manager
PURCHAG	Purchasing Agent

User ID and Password	Description
RECAG	Receiving Agent
TECHSUP	Technical Support

PeopleSoft High Tech Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft high technology industry:

User ID and Password	Description
HITECHADMIN	High Technology Administrator
HITECHAGENT	High Technology Agent
HITECHSS	High Technology Self-Service
HITECHGUEST	High Technology Guest

PeopleSoft Government Industry User IDs

This table lists the predefined user IDs and passwords for the PeopleSoft government industry:

User ID and Password	Description
GOVADMIN	Government Administrator
GOVAGENT	Government Agent
GOVSS	Government Self Service
GOVGUEST	Government Guest
GOVMGR	Government Manager

PeopleSoft Marketing User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Marketing:

User ID and Password	Description
CAMPMGR	Campaign Manager
MKTAA	Marketing Application Administrator
MKTANAL	Marketing Analyst
MKTCRT	Marketing Creative
MKTMGR	Marketing Manager
MKTRES	Marketing Researcher
SRVCONA	Service Contract Administrator

PeopleSoft Sales User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Sales:

User ID and Password	Description
SLSREP	Inside Sales Rep
FLDSLSREP	Field Sales Rep
SLSMGR	Sales Manager
LDQUAL	Lead Qualifier
SLSAA	Sales Application Administrator
CHSLSMGR	Channel Sales Manager

PeopleSoft Order Capture User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Order Capture:

User ID and Password	Description
OCADMIN	Order Capture Administrator
OCMGR	Order Capture Manager
OCREP	Order Capture Representative

PeopleSoft Order Capture Self Service User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Order Capture Self Service:

User ID and Password	Description
CPCUST	Customer
CPSS	Customer Self Service
GUEST	Guest
HITECHGUEST	High Technology Guest
USGUEST	Guest - US001 (USA)

PeopleSoft Quality User IDs

This table lists the predefined user IDs and passwords for PeopleSoft Quality:

User ID and Password	Description
QAANAL	Quality Analyst
QAAA	Quality Application Administrator
QAMGR	Quality Manager

PeopleSoft Multichannel Applications User IDs

This table lists the predefined user IDs and passwords for users implementing PeopleSoft multichannel applications:

User ID and Password	Description
ERMSMGR	ERMS Manager
ERMSAGENT	ERMS Agent

Security Options Page

Use the Security Options page (SECURITY_OPTIONS) to select the type of security to implement (user or permission list) and the key fields that are controlled by the security settings.

Navigation:

Set Up CRM > **Security** > **Security Options** > **Security Options**

This example illustrates the fields and controls on the Security Options page.

Type of Security

Field or Control	Description
No Security	Select to disable PeopleSoft application security. All users who are authorized to access a page can select any valid setID or business unit. PeopleSoft CRM applications are delivered with security disabled.
User ID Level Security and **Permission List Level Security**	Select to enable PeopleSoft application security by user ID or permission list. Each option controls which rows of data a user can see based on user ID or permission list.

Secured Fields

Field or Control	Description
Business Unit	Select to implement security for the **Business Unit** field, which is the primary key for many transactional data tables. In some situations, the **Business Unit** field is a non-key field on a record.
SetID	Select to implement security for the SetID field, which is the primary key for many setup and rules tables. In some situations, the SetID field is a non-key field on a record.

Apply Security Setups Page

Use the Apply Security Setups page (RUN_FIN9001) to initiate the process that activates the selected security options.

Navigation:

Set Up CRM > **Security** > **Apply Security Setups** > **Apply Security Setups**

This example illustrates the fields and controls on the Apply Security Setups page.

Select the language that you are using to apply security and then click **Run** to load the security views that you created.

It is highly recommended that you clear the application server cache after the *Apply Security* process has completed. Check the process monitor to determine when the process has finished.

Use the *RD_CACHE_DEL* application engine program to clear the application cache.

One way to run this program is directly from the operating system command line:

- Navigate to the <%PS_CFG_HOME>\bin\client\winx86 directory.

- Enter the following command: **psae -CT <dbtype> -CS <server> -CD <database name> -CO <oprid> -CP <oprpswd> -R <run controlid> -AI <program id> -I <process instance>**

  As an example, a user operating with a Microsoft database named *CR910TST* on a server named *ADDB0123* might type **psae -CT MICROSFT -CS ADDB0123 -CD CR910TST -CO PS -CP PS - R CRM -AI RD_CACHE_DEL -I 1**

Application Engine programs can also be submitted online from the Application Engine Request page. **PeopleTools** > **Application Engine** > **Request AE**)

See "Managing Application Engine Programs" in *PeopleTools: Application Engine* product documentation.

Security View Names Page

Use the Security View Names page (SECURITY_VIEWS) to define the type of security for each view in the system.

The Apply Security Setups process changes the security view names to match the levels of security for each view. These names use the file extensions for the corresponding security type.

Navigation:

Set Up CRM > **Security** > **Security View Names** > **Security Views Names**

This example illustrates the fields and controls on the Security View Names page.

Field or Control	Description
Search Text	Displays the view name prefixes supplied by each application. When you run the Apply Security Setups process, the system searches for view names that begin with these prefixes. If a view name begins with a prefix from this list, the process changes the view name extension to match the security type that you selected in the security options. The system stores the list in the SEC_VIEW_NAMES table, where you can review or update this information. You can also configure new security views for the system on this page. **Note:** There is no need to access this page unless you want to implement customized security views.

Field or Control	Description
No Security View User ID Security View and **Permission List Security View**	Displays the different security views for the view name prefixes that are supplied by each application. When you run the Apply Security Setups process, the Application Engine process can switch to the Permission List Security View (CLSVW), the User ID Security View (OPRVW) or the No Security View (NONVW) based on the option you selected on the Security Options page.
Type	Select the type of field (*SetID* or *Unit*) that the security view affects.

Business Unit Security by Permission List Page

Use the Business Unit Security by Permission List page (SEC_BU_CLS) to grant access to a business unit by using a permission list.

Navigation:

Set Up CRM > **Security** > **Unit by Permission List** > **Business Unit Security by Permission List**

This example illustrates the fields and controls on the Business Unit Security by Permission List page.

Select the business units to which you want the permission list to have access.

Note: PeopleSoft does not deliver any business units that are associated with permission lists. You must make this association using the Business Unit Security by Permission List page.

Business Unit Security by User ID Page

Use the Business Unit Security by User ID page (SEC_BU_OPR) to grant access to a business unit by using a user ID.

Navigation:

Set Up CRM > **Security** > **Unit by User ID** > **Business Unit Security by User ID**

This example illustrates the fields and controls on the Business Unit Security by User ID page.
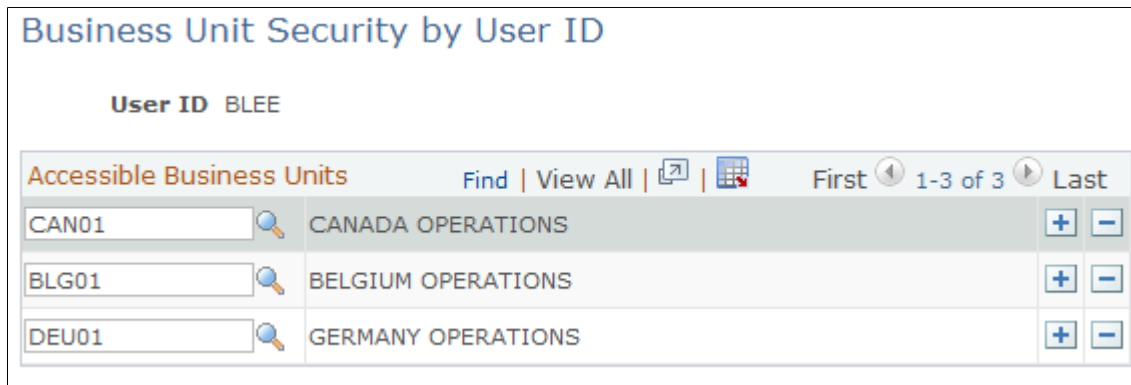
Select the business units to which you want the user ID to have access.

Note: PeopleSoft does not deliver any business units that are associated with user IDs. You must make this association using the Business Unit Security by User ID page.

TableSet Security by Permission List Page

Use the TableSet Security by Permission List page (SEC_SETID_CLS) to grant access to a tableset using a permission list.

Navigation:

Set Up CRM > **Security** > **TableSet by Permission List** > **TableSet Security by Permission List**

This example illustrates the fields and controls on the TableSet Security by Permission List page.

Select the setIDs to which you want the permission list to have access.

TableSet Security by User ID Page

Use the TableSet Security by User ID page (SEC_SETID_OPR) to grant access to a tableset by using a user ID.

Navigation:

Set Up CRM > **Security** > **TableSet by User ID** > **TableSet Security by User ID**

This example illustrates the fields and controls on the TableSet Security by User ID page.

Select the setIDs to which you want the user ID to have access.

Overall Preferences Page

Use the Overall Preferences page (OPR_DEF_TABLE_RB1) to define overall preferences for a specified PeopleSoft user.

Navigation:

Set Up CRM > **Security** > **User Preferences** > **Overall Preferences**

This example illustrates the fields and controls on the Overall Preferences page.

Note: User preferences are associated with user IDs. When you create user IDs for implementation team members and PeopleSoft users, define preferences for each user.

Field or Control	Description
Business Unit	Select the user's default business unit. Select a business unit that is valid for the pages that the user normally accesses.
SetID	Select the default setID for this user. The setID represents a set of control table information. SetIDs enable business units to share a set of control table information.
As of Date	Select the default date to use as the as of date when running date-driven reports and processes.
Localization Country	Select the country code for the localization country.

Field or Control	Description
Requester	Enter a default requester ID to appear on requisitions that are initiated by this user from the Manage Material component in PeopleSoft Integrated FieldService or the RMA Form (return material authorization form) component in PeopleSoft Support. **Important!** If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing.
Role Type ID	If a self-service user has multiple roles, select the role type to use as the default when signing in to the self-service site. The only supported role types for self-service users are individual consumer (role type 9) and contact (role type 8).
Company Name	For self-service users who can represent multiple companies, select the company whose data appears when the contact first signs in.
Market	Select the preferred market for the user ID. The preferred market associated with the user ID determines what data and functionality are available to the user.
Order Capture Unit	Select the order capture unit that you want the system to use as a default for the user. This business unit is used by Order Capture, Order Capture Self Service, and product catalog. The system uses this business unit to derive the setID that is used to retrieve product catalogs the selected user can access (including PeopleSoft Order Capture Self Service guest user IDs). If this business unit is not specified, the system looks up the order capture business unit (marked as default business unit) that is defined under **Set Up CRM** > **Business Unit Related** > **Order Capture Definition** > **Business Unit** > **Order Capture Definition.** See "Defining Order Capture Business Units" (PeopleSoft Order Capture Applications).
PIM Preference ID (personal information manager preference ID)	Select the preference ID that you want the system to use if the user is a personal information manager.
Duplicate Parm Set	This field is not used now in PeopleSoft CRM. No value is required for this field.
Alternate Character Enabled	Select to activate the fields that support alternate character functionality in application pages that are so enabled. The alternate character fields do not appear on application pages until you select this check box.

Related Links

Alt Character Page

Call Center Page

Use the Call Center page (OPR_DEF_TABLE_RC) to define preferences for call center agents and other users of the Case component.

Navigation:

Set Up CRM > Security > User Preferences > Call Center

This example illustrates the fields and controls on the Call Center page (1 of 3).

This example illustrates the fields and controls on the Call Center page (2 of 3).

This example illustrates the fields and controls on the Call Center page (3 of 3).

Default Business Units and Display Template ID

Field or Control	Description
Primary	Select this check box if you want the system to use the display template, component, market, and business unit as the user's primary default. Selecting a primary business unit provides the system with a default for items that are call-center related. It does not affect functionality that is business-unit driven such as the category/type/detail setup table default or solution searching in self-service.
Template Family	Select the display template family that you want the system to default to for the user. 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. See "Display Template Families" (PeopleSoft Call Center Applications).
Component	Select the component that you want the system to default to for the user. Components can be associated with multiple display templates, each of which provides a different presentation of a page.
Business Unit	Select the business unit that you want the system to default to for the user for the display template, component, and market.
Display Template ID	Select the display template that you want the system to default to for the user. Display templates enable you to control the appearance and behavior of components (pages or sets of pages) for your various business needs.

Frequently Used Solution

Field or Control	Description
Maximum Solutions to Display	Enter the maximum number of solutions that are to appear on the Frequently Used Solutions page.

EBS Security

Enter values in this section of the page if implementing the integration between PeopleSoft CRM HR HelpDesk and Oracle E-Business HCM.

Field or Control	Description
Responsibility Name	Enter the Responsibility Name to be passed to the Oracle E-Business HCM system as part of the security authorization for this user.
Responsibility Application	Enter the Responsibility Application to be passed to the Oracle E-Business HCM system as part of the security authorization for this user.
Security Group Name	Enter the Security Group Name to be passed to the Oracle E-Business HCM system as part of the security authorization for this user.
Organization ID	Enter the Organization ID to be passed to the Oracle E-Business HCM system as part of the security authorization for this user.

Solution

Use this section to enter default values to be populated on the solution dashboard pagelets.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

Field or Control	Description
Product SetID and **Product**	Enter the setID and name of the default product to use for populating the Top Solutions by Product pagelet.
Category SetID and **Category**	Enter the setID and name of the default category to use for populating the Top Solutions by Category pagelet.
Library SetID and **Library Name**	Enter the setID and name of the default solution library to use for populating the Top Solutions by Library pagelet.

SLA (Service Level Agreement)

Use this section to enter default values to be populated on the case SLA dashboard pagelets for the corresponding vertical families, Support, HelpDesk, HR HelpDesk and Higher Education.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

Field or Control	Description
View By	Select the default value to appear on the **View By** field of the SLA pagelets when they are launched initially. Available values are *Priority* and *Status*.
SLA Unit	Select the business unit by which the case information on the SLA pagelets is filtered and displayed.
Manager	Select the manager of the provider groups by which the case information on the pagelet is filtered and displayed. This value is used only for the SLA pagelet that is available in the Manager Dashboard.

Case Backlog

Use this section to enter default values to be populated on the case backlog dashboard pagelets for the corresponding vertical families, Support, HelpDesk, HR HelpDesk and Higher Education.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

Field or Control	Description
Backlog View By	Select the default value to appear on the **View By** field of the case backlog pagelets when they are launched initially. Available values are *Priority* and *Status*.
Backlog Unit	Select the business unit by which the case information on the case backlog pagelets is filtered and displayed.
Manager	Select the manager of the provider groups by which the case information on the pagelet is filtered and displayed. This value is used only for the case backlog pagelet that is available in the Manager Dashboard.

Case Arrivals versus Closures

Use this section to enter default values to be populated on the case arrivals versus closures dashboard pagelet for the corresponding vertical families, Support, HelpDesk, HR HelpDesk and Higher Education.

At runtime, these values can be modified through the personalization option on the corresponding pagelet. Runtime changes are updated on this page as well.

Field or Control	Description
Arrival View By	Select the default value to appear on the **View By** field of the case arrivals versus closures pagelet when it is launched initially. Available values are *Day, Week* and *Month*.
Arrival Unit	Select the business unit by which the case information on the case arrivals versus closures pagelet is filtered and displayed.
Manager	Select the manager of the provider groups by which the case information on the pagelet is filtered and displayed. This value is used only for the case arrivals versus closures pagelet, which is only available in the Manager Dashboard.

Related Links

"Understanding Call Center Business Units" (PeopleSoft Call Center Applications)
"Understanding Display Templates" (Automation and Configuration Tools)
"Understanding Services Operational Dashboards" (PeopleSoft Call Center Applications)

Sales Page

Use the Sales page (OPR_DEF_TABLE_RSF) to define preferences for sales representatives.

Navigation:

Set Up CRM > **Security** > **User Preferences** > **Sales**

This example illustrates the fields and controls on the Sales page.

Sales Defaults

Field or Control	Description
Sales Business Unit	Select the assigned business unit. While looking up Sales Business Units, if you are unable to see them, run the Application Engine by navigating to **SetUp CRM** > **Security** > **Apply Security Setups**. After running the Application Engine, restart the Application Server. Now, Sales Business Units will be displayed in the Look Up Sales Business Unit page.
Tree Name	Select the default sales territory tree to which the sales user can be assigned.
Assignment Group	Select in what kind of assignment group that you want this sales user to appear. **Note:** Assignment group is part of territory assignment criteria.
Field Delimiter	Choose to use delimiters other than the comma, such as the semicolon. This is used for lead import.

Field or Control	Description
Auto Insert to My Contacts	Select to enable the user to automatically insert contacts for a company, person, lead, or opportunity to the user's My Contacts list. The insert is triggered when the user clicks the **Add to My Contacts** toolbar button and the user is either an account owner or account team member for the company, person, lead, or opportunity.

Related Links

"Understanding Sales Users" (PeopleSoft Sales)

Understanding Contact Management

Change Management Page

Use the Change Management page (OPR_DEF_TABLE_RG) to select user default values that you want the system to display on the Change Request page in PeopleSoft HelpDesk.

Navigation:

Set Up CRM > **Security** > **User Preferences** > **Change Management**

This example illustrates the fields and controls on the Change Management page.

Select the values that you want the system to display by default for the user on to the Change Request page in PeopleSoft HelpDesk.

Related Links

"Understanding Change Request Access" (PeopleSoft Call Center Applications)

Account Page

Use the Account page (OPR_DEF_TABLE_RSP) to select default values that you want the system to use when it does account assignments.

Navigation:

Set Up CRM > **Security** > **User Preferences** > **Account**

This example illustrates the fields and controls on the Account page.

Select the values that you want the system to use when it assigns accounts to the user.

Secure Worker Role Page

Use the Secure Worker Role page (RB_ROLE_WORKER) to define user roles that can access sensitive and semi-sensitive worker information.

Navigation:

Set Up CRM > **Security** > **Secured Worker Role** > **Secured Worker Role**

This example illustrates the fields and controls on the Secured Worker Role page.

Note: This security applies to the worker component only, not the case. You may use a HelpDesk for Human Resources case template, which displays some of these fields in the Case component, without checking these security options.

Role Access to Data

Field or Control	Description
Role Name	Select the role that needs access to sensitive and semisensitive data. The roles that are defined in the example are from sample data that PeopleSoft delivers with the application. If you want to create your own roles and use them here, you must first define them in the Roles component. Select **PeopleTools** > **Security** > **Permissions & Roles** > **Roles.**
Confidential Information	Select this check box to enable the role to have access to these worker fields: **Gender, DOB** (date of birth), **Age, National ID,** and **Employee Status.**
Home Contact Methods	Select this check box to enable the selected role to have access to these worker fields: **Home Address, Home Phone, Home Email,** and **Home Pager.**

Field or Control	Description
Correct Job Details	Select this check box to allow the selected role to view and change all existing rows and to add new rows with no effective date restrictions. Otherwise, the selected role can change only future rows and enter new rows with an effective date greater than the current row.

Related Links

"Understanding the Integration Between PeopleSoft CRM and PeopleSoft or E-Business HCM" (PeopleSoft Call Center Applications)

Implementing Self-Service Security

To implement self-service security, use the Security Privilege (RB_SRTY_PRIV_DELTA), Role Privilege (RB_SRTY_PRIV_DFLT), Guest Registration (RX_GUEST_REG_TMPLT), Customer Registration (RX_CUST_REG_TABLE), Representative Registration Table (RX_REP_REG_TABLE), Security Privilege (RB_SRTY_PRIV), and Registration Text Setup (RX_REGTXT_SETUP), components.

This topic provides overviews of privilege codes and custom privilege codes.

Pages Used to Implement Self-Service Security

Page Name	Definition Name	Usage
Security Privilege Code Setup Page	RB_SRTY_PRIV	Define the privileges that are associated with the privilege codes.
Assign User Privileges Page	RB_SRTY_PRIV_DELTA	Assign user privileges.
Assign Role Privileges Page	RB_SRTY_PRIV_DFLT	Assign privileges to roles.
Existing Customer User Registration Setup Page	RX_CUST_REG_TABLE	Create templates of records and fields to be used on the User Registration Setup page.
Business User Registration Setup Page	RX_REP_REG_TABLE	Register business users.
User Registration Setup Page	RX_GUEST_TEMPLATE	Register guest users.
Terms and Conditions - Self Service Registration Page	RX_REGTXT_SETUP	Set up terms and condition statements for users completing self-service registration.

Page Name	Definition Name	Usage
Terms and Conditions -Terms of Service Page	RX_TERMS_SETUP	Set up terms of service statements for users completing self-service registration.
Terms and Conditions - Privacy Policy Page	RX_PRVACY_SETUP	Set up privacy policy statements for users completing self-service registration.

Understanding Privileges Codes

The self-service functionality within PeopleSoft CRM applications includes a predefined set of privilege codes. Assign these privilege codes to users or roles to provide security for particular types of transactions, as defined in the usage column in this table:

Privilege Code	Description	Usage	Is Amount Associated?
ORDERSAVE	Save orders.	Enable users to save orders. (The button is available or unavailable.)	No.
QUOTESAVE	Save quotes.	Enable users to save quotes. (The button is available or unavailable.)	No.
ADDRMAINT	Maintain existing address.	Enable users to update existing addresses. (The button is available or unavailable.)	No.
ADDRMAINTCNT	Maintain existing contact.	Enable users to update existing contacts.	No.
ADDRNEW	Add new address.	Enable users to add new addresses. (The button is available or unavailable.)	No.
ADDRNEWSITE	Convert address to site.	Enable users to convert the address to site. (The button is available or unavailable.)	No.
ADDRNEWCNTCT	Add new contact person.	Enable users to add a new contact person. (The button is available or unavailable.)	No.
NEWACCT	Create new account.	Enable users to create a new account.	No.

Privilege Code	Description	Usage	Is Amount Associated?
VIEWALLORDRS	View all orders.	Enable users to view all orders placed by others with an amount less than the amount specified. (The rows are available or unavailable.)	Maybe.

You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount. |
| VIEWALLQUOTS | View all quotes. | Enable users to view all quotes that were placed by others with an amount that is less than the amount specified. (The rows are available or unavailable.) | You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount. |

Understanding Custom Privilege Codes

You can define your own privilege codes and associate them with transactions on the User Privileges page and Role Privileges page. After you define the privilege codes, you must add the custom code to the transaction that has the custom security level.

To define a privilege code that prevents consumers from ordering more than 100,000 USD worth of goods:

1. Define the Order Amount privilege code (CUSTORDAMT).

2. On the Role Privileges page, assign the privilege code to the individual consumer role and specify that the amount must be less than 100,000 USD.

3. On the FieldChange event of the **Order Submit** button, add the following code:

```
Declare Function IsTransactionAuthorized PeopleCode FUNCLIB_RB.SRTY_PRIV_CD Fi⇒
eldFormula;

Local number &output_msg_set_nbr, &output_msg_nbr;

If Not IsTransactionAuthorized(&roleType, &strPersonID, &numBOIDCustomer,
 CUSTORDAMT, &numAmount, &output_operator_cd, &output_amount_qty, &output_msg_⇒
set_nbr, &output_msg_nbr) Then
   If All(&output_msg_set_nbr, &output_msg_nbr) Then
      Error MsgGet(&output_msg_set_nbr, &output_msg_nbr, "Message Not Found.")⇒
;
   End-If;
End-If;
```

In the preceding code example, pass &roleType as *9* (the Individual Consumer role). Pass &strPersonId as the person ID, and pass &numBOIDCustomer as the customer's business object ID. The privilege code is CUSTORDAMT, which is your defined custom privilege code. &numAmount is the amount of the customer's order. The remaining parameters are output parameters that you do not need to pass.

Use the delivered PeopleSoft CRM self-service code as an example to customize security of other transactions.

Security Privilege Code Setup Page

Use the Security Privilege Code Setup page (RB_SRTY_PRIV) to define the privileges that are associated with the privilege codes.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Privilege Codes** > **Security Privilege Code Setup**

This example illustrates the fields and controls on the Security Privilege Code Setup page.

Enter a description of the privilege code that you are adding.

Assign User Privileges Page

Use the Assign User Privileges page (RB_SRTY_PRIV_DELTA) to assign user privileges.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **User Privileges** > **Assign User Privileges**

This example illustrates the fields and controls on the Assign User Privileges page.

Define user privileges by associating a person with a business contact and assigning privilege codes. The business contact is typically a customer that the person represents. The user privileges enable you to define self-service security more specifically than the role privileges.

For example, suppose that a contact's role privileges do not enable the contact to update customer address information. If you need to enable a particular contact to update addresses, you could do that by assigning

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the user privilege to that contact. Conversely, suppose that a contact's role can submit a quote, but you want to revoke a particular contact's privilege to submit quotes. You do that by adding the privilege for submitting quotes and then selecting the **Revoke** check box.

Field or Control	Description
Business Contact Name and **Privilege**	Select the business contact's name and the privilege code.
Revoke	Select to revoke a privilege.
Operator and **Amount**	For transactions that are dependent on an amount, you can define privileges that are associated with particular amounts. If the system authenticates the user for the amount, it displays the appropriate information. For the **Amount** field, only numeric values are relevant; the system does not take the currency into account.
Message Set Number and **Message Number**	Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message.

PeopleSoft Order Capture Self Service is delivered with two privilege codes that are built to use privilege amounts: View All Orders (VIEWALLORDRS) and View All Quotes (VIEWALLQUOTS). These privileges are associated with an amount that further restricts access to order or quotes over a certain dollar amount.

Assign Role Privileges Page

Use the Assign Role Privileges page (RB_SRTY_PRIV_DFLT) to assign privileges to roles.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Role Privileges** > **Assign Role Privileges**

This example illustrates the fields and controls on the Assign Role Privileges page.

Only two business object roles (as defined in the Customer Data Model) are supported with PeopleSoft CRM self-service. These are consumer and contact. View the sample data for the role privileges and follow the sample as a guideline. If you have transactions for which data filtration is based on an amount, use the **Amount** field.

Field or Control	Description
Amount	Use this field if you have transactions for which data filtration is based on an amount.
Message Set Number and **Message Number**	Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message.

Existing Customer User Registration Setup Page

Use the Existing Customer User Registration Setup page (RX_CUST_REG_TABLE) to create templates of records and fields to be used on the User Registration Setup page.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Existing Customer Registration** > **Existing Customer User Registration Setup**

This example illustrates the fields and controls on the Existing Customer User Registration Setup page.

Use this page to set up templates for the fields and records that you want to use for customer registration. Once you save the template, you can select it from the **Template** field within the **Customer Registration Fields** group box on the User Registration Setup page.

When you set up existing customer user registration, you specify the information that customers enter to verify their status as existing customers. The system uses this as a template that appears for customers to enter the information

Note: For security reasons, set up at least two keys that are known only to the user.

Business User Registration Setup Page

Use the Business User Registration Setup page (RX_REP_REG_TABLE) to register business users.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Business User Registration** > **Business User Registration Setup**

This example illustrates the fields and controls on the Business User Registration Setup page.

To administer self-registration as a business user (a contact of a company), use the Business User Registration Setup page to establish a company code and password (company key).

The company name is the company for whom you are setting up the registration keys. When a self service user or external company administrator uses the company key to register, the user that is created by the system is tied to the company defined on this page.

Field or Control	Description
Company Key	Enter a value that you provide to a company administrator so that their users can self-register and gain access to the site. The company code and key are used to authenticate users who attempt to register at the self-service site.
Max Registrations Allowed (maximum registrations allowed)	Enter the number of users that are permitted to register with this specific company code.
Assign contact Roles	Select *Sold To, Bill To,* or *Ship To* to establish the capacity of the business users that represents the company.

User Registration Setup Page

Use the User Registration Setup page (RX_GUEST_TEMPLATE) to register guest users.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **User Registration** > **User Registration Setup**

This example illustrates the fields and controls on the User Registration Setup page (1 of 2).

This example illustrates the fields and controls on the User Registration Setup page (2 of 2).

Self-service security is controlled by privileges that you establish and assign to guest user IDs. When a user registers, the system clones the currently active guest ID, with all its access privileges, to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

See Setting Up Guest IDs to Access Self-Service Sites.

To administer registration through PeopleSoft CRM self-service, you must set up a guest user ID. The guest user acts as an administrator and provides the defaults that are necessary to establish new users.

Field or Control	Description
User ID	Displays the guest user ID, which is used to make the self-service site available to anonymous users. You can add several guest users. Associate each guest user with a different business unit that is defined on the User Preferences page. By defining several guest users, you can provide access to different self-service sites that support different segments of the business. For example, suppose that the user ID *GUEST* is associated with business unit US001, which sells sporting good products. When you implement these sites, you can define both guest users, and users can access either site depending on the guest user ID that they supply. Similarly, you can make the language of a site dependent on the guest user ID.
Password	Enter the exact password that authenticates the guest user. The user ID and password in combination are either appended to the URL string that provides direct access to the site or is placed in the config.properties file in PeopleTools installation. Refer to the installation instructions for more information about installing direct access to your website.
Password Never Expires and **Password Expires in Days**	Select one of these values to indicate when the password expires. If you select *Password Expires in Days,* enter the number of days.
Consumer Name	Select the template that you want to use for the consumer name. Guest users visiting the self-service site might create their own accounts but only provide minimal information, such as user ID, password, name, email, phone, and address information. The guest user does not enter other required information, such as currency, payment method, and carrier information, which appears by default from the template consumer.
Process Profile and **Primary**	Assign an appropriate permission list that has access to run batch processes. This permission list is copied to the new user that is created through self-service.
Template	Select the template that contains the fields and records that you want to use for guests using self-service registration.
Terms and Conditions	Select the template that contains the terms and conditions, terms of service, and privacy statements that you want to use for guests using self-service registration.
Catalog and Customer Care	Select the item to which you want to direct self-service users.

Field or Control	Description
Role Name	Grant roles for consumer and business users by selecting role names from the lists in the **Grant Consumer Role(s)** and **Grant Business User Role(s)** grids. You can add as many roles as you want. When a consumer is created, the consumer roles that you specify are assigned to the new consumer user; and when a business user is created, the business user roles that you specify are assigned to the new business user. To enable guest users to create their own user IDs, you must define the roles that a guest user can grant to create self-service users. For example, in the delivered sample data, the GUEST role and the PeopleTools role UPG_ALLPAGES can grant the consumer role. When the VP1 user signs in to set up the guest user registration, that user can select the consumer role. When the guest user or an anonymous user registers as a consumer, the system assigns the new user to the consumer role.

Related Links

Understanding Customer Self-Service

Terms and Conditions - Self Service Registration Page

Use the Terms and Conditions - Self Service Registration page (RX_REGTXT_SETUP) to set up terms and condition statements for users completing self-service registration.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Terms and Conditions** > **Self Service Registration**

This example illustrates the fields and controls on the Terms and Conditions - Self Service Registration page.

Enter the text for the terms and conditions that you want users to see during self-service registration.

Terms and Conditions -Terms of Service Page

Use the Terms and Conditions -Terms of Service page (RX_TERMS_SETUP) to set up terms of service statements for users completing self-service registration.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Terms and Conditions** > **Terms of Service**

This example illustrates the fields and controls on the Terms and Conditions - Terms of Service page.

Enter the text for the terms of service that you want users to see during self-service registration.

Terms and Conditions - Privacy Policy Page

Use the Terms and Conditions - Privacy Policy page (RX_PRVACY_SETUP) to set up privacy policy statements for users completing self-service registration.

Navigation:

Set Up CRM > **Security** > **Self-Service** > **Terms and Conditions** > **Privacy Policy**

This example illustrates the fields and controls on the Terms and Conditions - Privacy Policy page.

Enter the text for the privacy policy that you want users to see during self-service registration.

Defining Application Security

To define application security, use the Security Profile Definition (RSEC_PROFILE_DEFN), Security Membership Definition (RSEC_MEMBER_DEFN), Security View Definition (RSEC_VIEW_DEFN), Security Function Definition (RSEC_FUNC_DEFN), Security Function Group (RSEC_FUNC_GROUP), Security Object Definition (RSEC_OBJECT_DEFN), Security Builder (RSEC_BUILDER_RUN), Security Static Transfer Menu (RSEC_STAT_MENU) components.

This topic discusses how to define application security.

Pages Used to Define Application Security

Page Name	Definition Name	Usage
Security Object Page	RSEC_OBJECT_DEFN	Define the characteristics of the security object.
Add Membership List (Definition) Page	RSEC_MEMBER_SMRY	Enter the membership list name and description.
Add Membership List (Object) Page	RSEC_SRTY_WIZ1	Select the membership list security object *(Customer, Person, or Role)* that you want to add.
Add Membership List (Type) Page	RSEC_SRTY_WIZ2	Select the type of addition to use, either *Static* to select from a list of object members, or *Dynamic* to build a SQL query to define criteria for the list.
Customer Static Member List - Add Membership List Page	RSEC_ML_CUSTOMER	Select the customers that you want to add to the membership list from the static list.
Person Static Member List - Add Membership List Page	RSEC_ML_PERSON	Select the individuals from the static list that you want to add to the membership list.
Role Static Member List - Add Membership List Page	RSEC_ML_ROLE	Select the roles from the static list that you want to add to the membership list . **Note:** Roles are static and are therefore not available dynamically from a query.
Customer Search - Add Membership List Page	RSEC_CUSTOMER_SRCH	Specify the criteria to use in the query to dynamically select customers for the membership list.
Person Search - Add Membership List Page	RSEC_PRSN_SRCH	Specify the criteria to use in the query to dynamically select individuals for the membership list.
Add View List (Definition) Page	RSEC_VIEW_SMRY	Enter the view list name and description.
Add View List (Object) Page	RSEC_SRTY_WIZ1	Select the view list security object *(Catalog, Customer, Hold Code, or Performance Metric)* that you want to add.

Page Name	Definition Name	Usage
View List (Type) Page	RSEC_SRTY_WIZ2	Select type of addition to use, either *Static* to select from a list of objects, or *Dynamic* to build a SQL query to define criteria for the list.
Catalog Static View List - Add Customer to View List Page	RSEC_VL_CATALOG	Select the catalogs from the static list that you want to add to the view list.
View List Page	RSEC_VIEW_SMRY	Select the catalogs from the static list that you want to add to the view list.
Customer Static View List - Add Customer To View List Page	RSEC_VL_CUSTOMER	Select the customers from the static list that you want to add to the view list.
Hold Static View List - Add View List Page	RSEC_VL_HOLD	Select the hold codes from the static list that you want to add to the view list.
Performance Metrics Security - Add View List Page	RSEC_VL_RA_METRICS	Select the performance metrics from the static list that you want to add to the view list.
Customer Search - Add View List Page	RSEC_CUSTOMER_SRCH	Specify the criteria to use in the query to dynamically select customers for the view list.
Functional Option Page	RSEC_FUNC_DEFN	Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.
Functional Option Group Page	RSEC_FUNC_GROUP	Group functional options.
Security Profile Page	RSEC_PROFILE	Define a security profile.
Security Profile - Membership Page	RSEC_PROFILEMEMBER	Add membership lists to the security profile.
Refresh Dynamic Lists Page	RSEC_BUILDER_RUN	Set run controls for the List Build process.
Static Menu Transfer Path Page	RSEC_STAT_MENU	Enter static menu transfer paths.

Security Object Page

Use the Security Object page (RSEC_OBJECT_DEFN) to define the characteristics of the security object.

Navigation:

Set Up CRM > Security > CRM Application Security > Security Object > Security Object

This example illustrates the fields and controls on the Security Object page.

Field or Control	Description
Object Type	Select either *Membership* or *View Privilege.* The Object type determines whether the Security Object is used for defining Membership List or View List.

Field or Control	Description
View Record	View record is used to resolve the list of members for a dynamic membership or view list. The view record must be a distinct subset of the search record that is used in defining the search for dynamic criteria.

Field or Control	Description
Security List Record	Select the record where you want the system to store the results of the query or static list that is associated with the security object. The security list record may vary for each security object.

Field or Control	Description
Object Source Navigation	Select the object source to which you want the system to navigate while creating dynamic membership or view lists. Selecting the object source that corresponds to the security object that you are creating provides for the proper transfer of the object source during the creation of dynamic membership or view lists. Data searches that are enabled for application security are only available as part of the selection. It is important to choose the correct search definition for the security object.

Field or Control	Description
Static List Navigation	Select the static list that you want the system to navigate to during the creation of the security profile.

This is the navigation that is used for entering static list data or viewing static list data that is either dynamically created or manually entered. You set up static list navigations on the Static Menu transfer page. The system builds the Static List page with the static list record as a level 1 grid. |
| **Cache Option** | Select the cache option that you want the system to use for the security object. The caching option is mainly used for customer security. Basically, when a customer is added or updated in the Customer Data Model (CDM), it tells the system how often to cache the list members in the list tables and run the Application Engine job that creates the dynamic queries. |

Field or Control	Description
Security Object Options	Select one or multiple security object options values: • *Allow Dynamic Members:* Select this check box if you want to create dynamic membership or view lists. • *Allow Reuse:* Select this check box if you want to create lists that can be associated with more than one security profile. If you clear this check box, the static or dynamic lists that you create can be attached to only a single security profile, and the security list record for these security objects will contain the security profile value. **Note:** This check box is used for performance reasons. When you select this check box, the system adds the security profile ID to the Security List Table. Using this option enables the system to make a three-table join and retrieve results quickly. • *Secure All:* Select this check box if you want the system to apply the view record on the security object definition. If you clear this check box, no security is applied on the view record. Clearing this check box also causes applications to skip the security check. **Note:** This check box is used for performance reasons. For example, if one of your security profiles is set up to give access to *All,* the security API will not return any data. It is implied that the calling application would display everything. In this situation users in Order Capture Administration have access to all hold codes. When the Order Capture application calls the Security API, the Security API gives the administrators access to all hold codes. In the code for the Order Capture application the system doesn't have to create an extra *Where* clause to show the filtered list of hold codes. **Note:** If you clear this check box, the SQL API returns a state status of three *(3).* If the SQL string that is returned contains SQL, then security must be applied. Empty strings cause the system to skip the security check. ERROR (or some other constant) indicates that the context has access to no security profiles and zero rows should be returned. • *Allow All:* Select this check box if you want the system to display the **All** field when you are adding view or membership lists to the security profile. • *Allow Multiple Members:* Select this check box if you want the system to display the **Multiple List**as an available option when you are creating a view or membership lists. • *Allow Single Member:* Select this check box if you want the system to display the **Single Member** as an available option when you are creating a view or membership list.

Field or Control	Description
	• *Show In Wizard:* Select this check box if you want the system to display the security object as a selectable option in the drop-down list box when you are creating membership or view lists.
Related Security Objects	Select the security objects that you want to be available with a security profile. For example, if a Membership-type security object is defined and associated with two related View-type security objects, then if a Security Profile is created using the same Membership object, only the two related objects that were specified on the Security Object page will be visible as options in the Security Object drop down list that appears after selecting the Add View List option for that Security Profile. *Warning!* Note that as delivered, the system is designed to only process certain combinations of membership and view objects, and that these combinations apply only to certain products (applications) within the system. These combinations are shown in the accompanying table. Only these combinations should be used when setting up your data. Other combinations are not supported in the system as delivered, and would require customized coding to implement.

When adding values to the **Related Security Objects** field, the supported combinations are:

Membership Object	View Object	Product (Application Usage)
CUSTOMERMEMBER (Customer)	*CATALOG* (Catalog)	Order Capture
PERSON (Person)	*CATALOG* (Catalog)	Order Capture
PERSON (Person)	*HOLDCODE* (Hold Code)	Order Capture
ROLE (Role)	*HOLDCODE* (Hold Code)	Order Capture

Add Membership List (Definition) Page

Use the Add Membership List (definition) page (RSEC_MEMBER_SMRY) to enter the membership list name and description.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Add Membership List** > **Add Membership List**

This example illustrates the fields and controls on the Add Membership List (definition) page .

Enter a name for the membership list that you want to create. Select the *Active* status. Enter text that describes the type of membership list that you are creating.

Add Membership List (Object) Page

Use the Add Membership List (object) page (RSEC_SRTY_WIZ1) to select the membership object and the members to which you want the security object to apply.

Navigation:

Click **Next** at the bottom of the Add Membership List (definition) page.

This example illustrates the fields and controls on the Add Membership List (object) page.

Field or Control	Description
Security Object	Select the security object that you want to use for your membership list: • *Customer* • *Person* • *Role* --- **Note:** You can also create your own security object and select it from this list. You would, however, need to call the delivered security APIs at runtime to access security.

Field or Control	Description
Membership Applies To	Indicate to whom you want the membership list to apply. Select: • *All:* Select if you want to the membership list to apply to all members associated with the security object. • *Multiple Members:* Select if you want the membership list to apply to select group of members that are associated with the security object. When you click **Next,** the system displays the next Add Membership List page, where you can select the membership type that you want to use (either dynamic or static). • *Single Member:* Select if you want the membership list to apply to a single member associated with the security object. When you click **Next,** the system displays the page that is associated with the security object (either customers, persons, or roles).
Next	Click to go to the next page. The system displays a new page based on the selections that you have made on the previous Add Membership List pages.

Add Membership List (Type) Page

Use the Add Membership List (type) page (RSEC_SRTY_WIZ2) to specify whether you want to select objects (customers, or persons) from a static list or dynamically using a SQL query.

Navigation:

Select **Dynamic** and then click **Next** at the bottom of the Add Membership List (object) page.

This example illustrates the fields and controls on the Add Membership List (type) page.

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Field or Control	Description
Membership Type	Select from these values: • *Dynamic:* Select to choose a dynamic list of members. When you click **Next,** a search page appears based on the security object that you selected on the second Add Membership List page. • *Static:* Select to choose a static list of members. When you click **Next,** a page appears based on the security object that you selected on the second Add Membership List page.
Next	Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Customer Static Member List - Add Membership List Page

Use the Customer Static Member List - Add Membership List page (RSEC_ML_CUSTOMER) to select the customers from the static list that you want to add to the membership list.

Navigation:

With the security object of *Customer* selected on the Add Membership List (object) page, select **Static,** and then click **Next** at the bottom of the Add Membership List (type) page.

This example illustrates the fields and controls on the Customer Static Member List - Add Membership List page.

Select the SetID and customer that you want to add to the membership list. Click the **Add Customer** button to add new customer members.

Role Static Member List - Add Membership List Page

Use the Role Static Member List - Add Membership List page (RSEC_ML_ROLE) to select roles from the static list that you want to add to the membership list.

Navigation:

With the security object of *Role* selected on the Add Membership List (object) page, select **Static,** and then click **Next** at the bottom of the Add Membership List (type) page.

This example illustrates the fields and controls on the Role Static Member List - Add Membership List page.
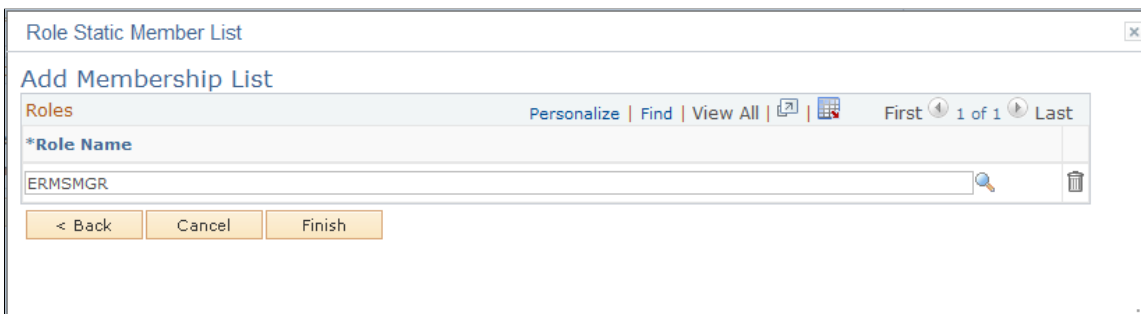
Select the role that you want to add to the membership list. Click the **Add Role** button to add new member roles.

Add View List (Definition) Page

Use the Add View List (definition) page (RSEC_VIEW_SMRY) to enter the view list name and description.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Add View List** > **Add View List**

This example illustrates the fields and controls on the Add View List (definition) page.

Enter a name for the view list that you want to create. Select the *Active* status. Enter text that describes the type of view list that you are creating.

Add View List (Object) Page

Use the Add View List (object) page (RSEC_SRTY_WIZ1) to select the view list security object *(Catalog, Customer, Hold Code, or Performance Metric)* that you want to add.

Navigation:

Click the **Next** button from the Add View List (definition) page.

This example illustrates the fields and controls on the Add View List (object) page.

Field or Control	Description
Security Object	Select the security object that you want to use for your view list. Choose from one of these delivered values: • *Catalog* • *Customer* • *Hold Codes* • *Performance Metric* **Note:** You can also create your own security object and select it from this list.
View Applies To	Select one of these values to indicate to whom you want the view list to apply: • *All:* Select this value if you want the view list to apply to all members associated with the security object. • *Multiple Members:* Select this value if you want the view list to apply to select group of members that are associated with the security object. When you click **Next,** the system displays the next Add View List page, where you can select the view type that you want to use (either dynamic or static). • *Single Member:* Select this value if you want the view list to apply to a single member associated with the security object. When you click **Next,** the system displays the page that is associated with the security object (either hold codes, catalogs, performance metrics, or customers.
Next	Click to go to the next page. The system displays a new page based on the selections that you made on the previous Add View List pages.

View List (Type) Page

Use the Add View List (type) page (RSEC_SRTY_WIZ2).to select type of addition to use, either *Static* to select from a list of objects, or *Dynamic* to build a SQL query to define criteria for the list.

Navigation:

Select type of addition to use, either *Static* to select from a list of objects, or *Dynamic* to build a SQL query to define criteria for the list.

This example illustrates the fields and controls on the Add View List (type) page.

Field or Control	Description
View Type	Select one of these values: • *Dynamic:* Select to define criteria for a dynamic list of members that you want included in your view list. When you click **Next,** a search page appears based on the security object that you selected on the second Add View List page. • *Static:* Select to choose a static list of members. When you click **Next,** a page appears based on the security object that you selected on the second Add View List page.
Next	Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Customer Static View List - Add Customer To View List Page

Use the Customer Static View List - Add Customer To View List (RSEC_VL_CUSTOMER) to select the customers from the static list that you want to add to the view list.

This example illustrates the fields and controls on the Add View List (static) page.

This page displays different fields based on the security object that you selected on the previous page. Select the setID (if this field appears) and the catalog, customer, hold code, or performance metric that you want to add to the view list.

Customer Search - Add View List Page

Use the Customer Search - Add View List page to specify the criteria to use in the query to dynamically select customers for the view list.

This example illustrates the fields and controls on the Customer Search - Add View List page.
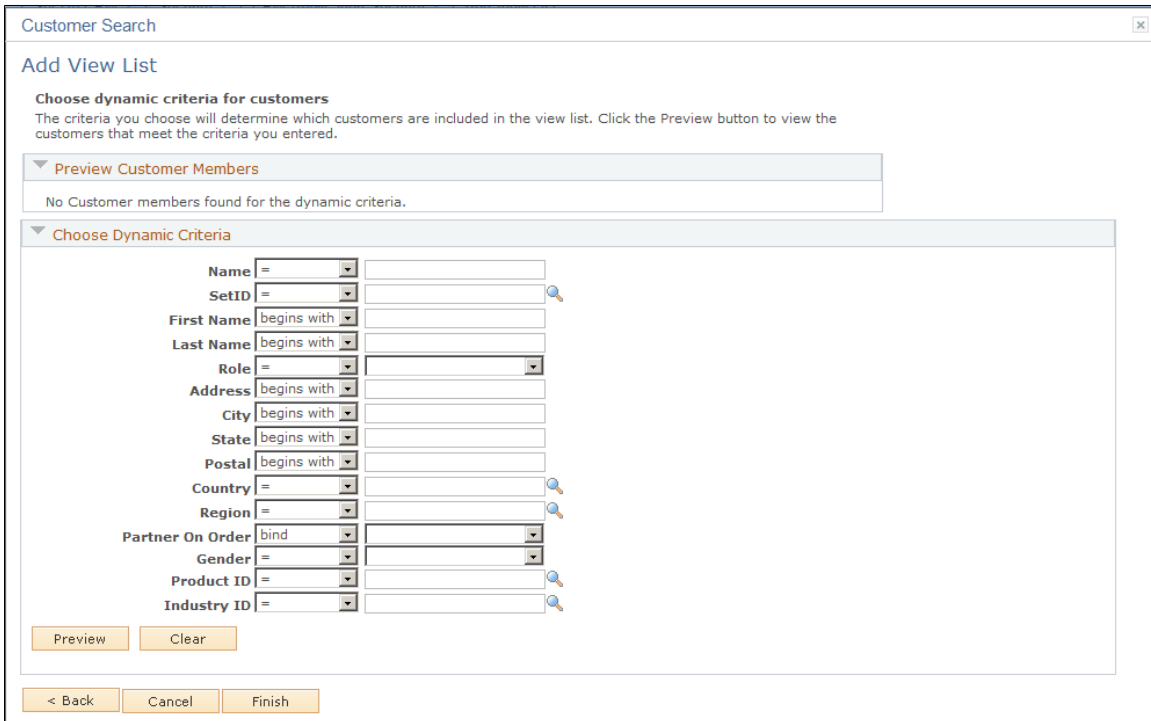
Select or enter the criteria that you want to use to create a view list. The system uses the criteria that you select to create a dynamic view list. To see the results of the criteria that you enter, click the **Preview** button. When you are satisfied with the results, click the **Finish** button at the bottom of the page.

Functional Option Page

Use the Functional Option page (RSEC_FUNC_DEFN) to define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Functional Option** > **Functional Option**

This example illustrates the fields and controls on the Functional Option page (1 of 2).

This example illustrates the fields and controls on the Functional Option page (2 of 2).

Field or Control	*Description*
Functional Option and Description	Enter a name for the functional option and then enter a description.

Field or Control	Description
Revoke Wins	Conflicts may happen when a user is associated with multiple security profiles using functional options that conflict or when the same security profile has overrides for conflicting functional options. Select this check box if you want the system to not override the security for the functional option that you are creating when there are conflicts within or among different security profiles. **Note:** If one functional option group grants an option and another revokes it, the revoke takes precedence. If the **Revoke Wins** check boxes are not selected in the same scenario, the option is granted.

Field or Control	Description
Related to Amount	Select to enable amount-related fields during the setup of functional option groups and specific functional options within the security profile.

Field or Control	Description
Maximum Amount Wins	Select this check box to indicate that you want the maximum amount to win when there are functional options that conflict within or among different security profiles

Field or Control	Description
Use Conditional Operator	Select to enable the conditional operator field during the setup of functional option groups and specific functional options within the security profile for amount-related fields.

Field or Control	Description
Base Currency	Select the currency that is used most often for the functional option that you are creating.

Field or Control	Description
Application Class ID, Application Class Path, and **Option Value Translate Field**	Use these fields if you are writing PeopleCode programs required to evaluate the functional option. Select the ID and path of the application class that the system carries out when a user accesses the function or when the program runs. Also, you can specify a value translate field with values that will be interpreted by the calling application to perform a specific functional action. For example, the display template uses a translate field that makes the fields display-only or changeable. See "Understanding Display Templates" (Automation and Configuration Tools).

Field or Control	Description
Message Set Number and **Denial Reason**	Select the message that you want the system to display if a user is denied access to the function.

Functional Option Group Page

Use the Functional Option Group page (RSEC_FUNC_GROUP) to group functional options.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Functional Option Group** > **Functional Option Group**

This example illustrates the fields and controls on the Functional Option Group page.

Use functional option groups to group functional options. You may then associate the functional option groups with security profiles. Creating functional option groups and using them with security profiles can help make security maintenance faster and more efficient.

Field or Control	Description
Functional Option Group and Description	Enter a name for the functional option group and then enter a description.

Functional Option Tab

Field or Control	Description
Functional Option	Select the functional options that you want to include in the functional option group.
Option Value	Select the value that you want to use for the functional option. This field is available for entry only if a translate field was set up on the functional option.
Revoke	Select this check box if you want the system to override the security for the functional option when there are conflicts within or among different security profiles. **Note:** Revoke applies to the functional option only (for example, does a user have authorization to transfer money). If one functional option group says yes and another says no, the functional option that has the *Revoke Wins* check box selected wins and resolves the conflict. For transfer amounts, there is another type of conflict resolution called *Max Amount Wins*. In this situation, if one functional option group gives you access to 2000 USD and another gives you access to 3000 USD, the maximum amount wins and you have the authority to transfer up to 3000 USD.
Add Function Option	Click to add a new row in the functional option grid.

Amount Related Tab

The fields that appear on this page are used if the functional option is associated with an amount field.

Field or Control	Description
Conditional Operator	Select the conditional operator (for example, equal to, less than, greater then, and so on) that you want to use for the functional option.

Field or Control	Description
Amount	Enter the amount that you want associated with the conditional operator for the functional option.

Field or Control	Description
Denial Reason	Select the reason that you want the system to display if the user is denied access to the transaction related to the functional option. For example, let's say you have given order capture representatives the ability to override prices. At some point in the season, you may want all of them to be denied from overriding prices on the items that you sell. You can go to the functional option group definition and set the Revoke Wins check box. From that point onward, the order capture representatives are denied from doing price overrides. You can set up similar situations for leads, opportunities, cases, and so on.

Security Profile Page

Use the Security Profile page (RSEC_PROFILE) to define a security profile.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Add Security Profile** > **Security Profile**

This example illustrates the fields and controls on the Security Profile page.

Defining security profiles involves the granting of view lists and/or functional options. You then grant or associate one or multiple membership lists with the security profile. An enterprise administrator

or enterprise channel manager should know how to create and maintain security profiles, as well as understand how security is impacted when a security profile changes.

Warning! Inactivating a security profile removes the associated membership and view lists

Field or Control	Description
Name and **Description**	Enter a name for the security profile and then enter a description.
Add Functional Option Group	Click to access the Functional Options Group page, where you can select the functional option groups that you want to include in the security profile. You can also use this page to view the functional options that are associated with the functional option group. The Enterprise Administrator who is assigning the Functional Option Groups must be aware of the groups that make sense for a given Membership list. Out of the box, all functional options and functional options groups that are delivered by PeopleSoft work with the 'Role' Security Membership Object.
Add View List	Click to access the Add View List page, where you can select the view lists that you want to include in the security profile.
Run	Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Security Profile - Membership Page

Use the Security Profile - Membership page (RSEC_PROFILEMEMBER) to add membership lists to the security profile.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Add Security Profile** > **Membership**

This example illustrates the fields and controls on the Security Profile - Membership page.

Field or Control	Description
Add Membership List	Click to access the Add Membership List page, where you can select the membership lists that you want to include in the security profile.
[Run] button	Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.
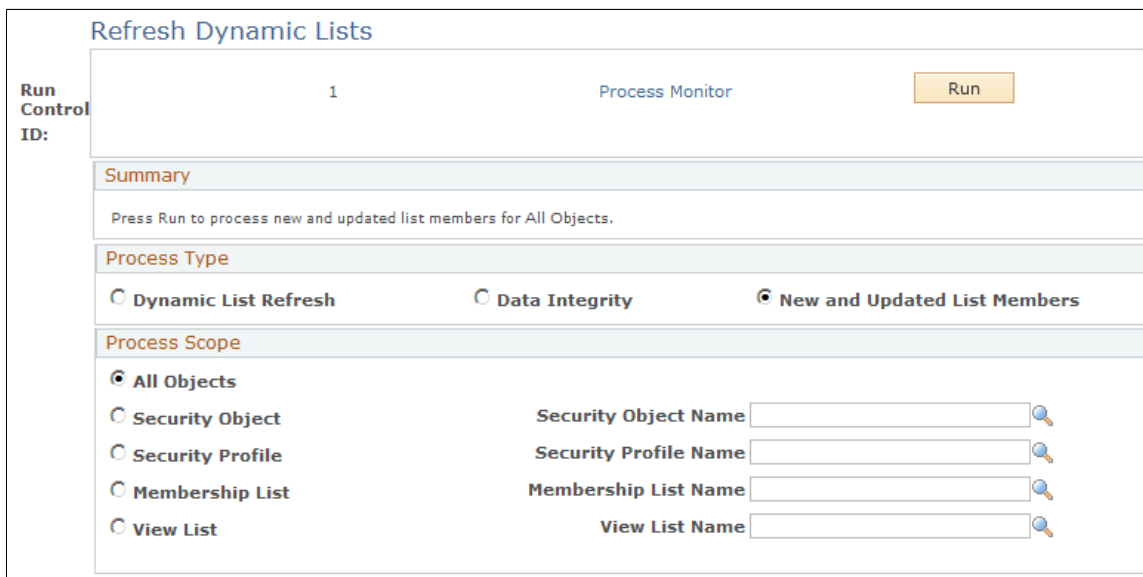
Refresh Dynamic Lists Page

Use the Refresh Dynamic Lists page (RSEC_BUILDER_RUN) to set run controls for the List Build process.

Navigation:

- **Set Up CRM** > **Security** > **CRM Application Security** > **Refresh Dynamic Lists** > **Refresh Dynamic Lists**

- **Click Run from the Security Profile page.**

This example illustrates the fields and controls on the Refresh Dynamic Lists page.

Use this page to refresh the lists, security objects, and profiles that you have created to implement security for your PeopleSoft CRM environment. If the content of the lists, objects, and profiles changes frequently, you can set up this process to run daily, every few minutes, or every few hours.

Note: When a new user registers in Order Capture Self Service, they will not have immediate permission to view the product catalog. Application security needs to be triggered to get the appropriate product catalog access for the person who has just registered.

Field or Control	Description
Process Type	Select one of these values based on the type of list that you want to refresh: • *Dynamic List Refresh.* • *New and Updated List Members.* • *Data Integrity.*
Process Scope	Select one of these lists or objects that you want to refresh: • *All Objects* • *Security Object* • *Security Profile* • *Membership List* • *View List* **Note:** If you select *All Objects,* you do not need to specify the objects that you want to refresh. If you select any other value, you must use the field that corresponds to your selection to select a list, profile, or object name.

Static Menu Transfer Path Page

Use the Static Menu Transfer Path page (RSEC_STAT_MENU) to enter static menu transfer paths.

Navigation:

Set Up CRM > **Security** > **CRM Application Security** > **Static Menu Transfer Path** > **Static Menu Transfer Path**

This example illustrates the fields and controls on the Static Menu Transfer Path page.

Use this page to create static menu transfer paths for entering or viewing static list data that is either dynamically created or manually entered. The static list navigations that you create on this page appear in the **Static List Navigation** drop-down list box on the Security Object page. Static list navigation is used when you create a security profile.

Chapter 5

Working with Notes and Attachments

Understanding Notes and Attachments

This topic discusses:

- Notes in PeopleSoft Customer Relationship Management (PeopleSoft CRM).

- Attachments.

- Note types.

Notes in PeopleSoft CRM

You can view and update notes in PeopleSoft CRM in two ways:

1. The Notes List (RB_NOTES_LIST) component.

2. Notes pages on CRM components and transactions.

The Notes List Component

This component summarizes notes that are entered on commonly used PeopleSoft CRM components: Lead, Opportunity, Case, Customer, Contact and Consumer, and enables you to select a note and transfer to the Notes page in the component to view and update note details.

Notes Pages

All PeopleSoft CRM components that can have notes attached to them use the same interface; however, the Notes page itself might vary slightly depending on the parent object. For example, case notes and order notes have a visibility field that determines whether self-service users can see the note when they look at the parent object. Other objects that are not accessible through self-service do not have this field.

Note Details

The note details view displays complete information for a single note, including a list of attachments that is associated with the note.

Notes Summary

The notes summary view lists all existing notes for the component.

Notes pages on some components include a summary notes list on the same page as the note details; for other components, the summary notes list is on a separate page. The summary notes list might also be part of a more general page.

Case notes can be associated with the case itself or with a resolution in the case. The notes summary view that is in the Case component displays both types of notes together. A resolution icon identifies notes that are part of a resolution.

Attachments

When you add an attachment to a note, you identify the file to attach. Once you identify the file, the system uploads the attachment to an attachment server. The attachment server stores attachment files, which ensures that the attachments are available to all users. You configure the system by using the Uniform Resource Locator (URL) Maintenance page to specify a URL for each component that supports attachments. This setup is part of the PeopleSoft CRM installation process.

See the installation guides on My Oracle Support.

Files stored as attachments have two names. The original name of the file at the time it was uploaded is stored in the ATTACHUSERFILE field. A system-generated unique file name, stored in the ATTACHSYSFILENAME field, is the actual name of the file on the file server. The different objects that store attachments have different file-naming patterns for generating the ATTACHSYSFILENAME value, but all patterns are based on the ATTACHUSERFILE file name.

For example, system names for case attachments are formed by concatenating the case number, the letter *C,* the note sequence number, the letter *R,* the attachment sequence number, and the original file name. The following code represents this pattern:

```
CASE_ID||"C"||NOTE_SEQ_NBR||"R"||ATTACH_SEQ_NBR||ATTACHUSERFILE
```

Except in the Product component, attachments are associated with a note rather than associated with the note's parent object. When you click the link for an existing attachment, the system launches the attachment. If the attachment is an executable or batch program, the system runs the program. If the attachment is any other type of file, the system handles it according to the operating system's rules, either opening the file in a new browser window, prompting for a location to download the file, or offering a choice between these two actions.

Note Types

Most differences in the Notes page for different parent objects are self-explanatory. However, there is one hidden difference: the **Note Type** field that appears in some components derives its values from different places depending on the parent object.

This table lists the pages where you define valid note types for objects that use note types:

Parent Object	*Source of Valid Note Types*
Business objects: Company, Consumer, Representative, and Site	Note Type page (BC_NOTETYPE_TBL), found under **Set Up CRM** > **Common Definitions** > **Notes**
Case and Solution	Case and Solution Note Type page (RC_NOTETYPE), found under **Set Up CRM** > **Common Definitions** > **Notes**

Parent Object	Source of Valid Note Types
Order/Quote	Product Note Type page (NOTE_TYPE), found under Set Up CRM, Common Definitions, Notes
Campaign Detail	Translate (xlat) table.
Other objects	Notes for other objects do not include a **Note Type** field.

Related Links

Setting Up Note Types

Setting Up Note Types

To set up note types, use the Note Types (RC_NOTETYPE) component.

This topic lists the pages used to set up note types.

Pages Used to Set Up Note Types

Page Name	Definition Name	Usage
Note Type Page	BC_NOTETYPE_TBL	Set up note categorization codes that you can reference on the notes pages available in the Company, and Person components.
Case and Solution Note Type Page	RC_NOTETYPE	Set up note types that you can reference on the notes pages available in the Case and Solution components.
Product Note Type Page	NOTE_TYPE	Set up note types that you can reference on the notes pages available in the Product component.

Creating Standard Notes and Product Notes

This topic discusses how to create standard notes and product notes.

Pages Used to Create Standard Notes and Product Notes

Page Name	Definition Name	Usage
Standard Notes Page	STD_NOTE	Create a standard note.
Product Notes Page	PROD_NOTE	Create product notes.

Standard Notes Page

Use the Standard Notes page (STD_NOTE) to create a standard note.

Navigation:

Set Up CRM > **Common Definitions** > **Notes** > **Standard Notes** > **Standard Notes**

This example illustrates the fields and controls on the Standard Notes page.

Field or Control	Description
Text	Enter up to 256 characters of text. You can modify the text, but you cannot have more than one entry.
Search Key Words	Enter keywords to select notes for reporting.
Print On Document	Not applicable to standard notes.

Product Notes Page

Use the Product Notes page (PROD_NOTE) to create product notes.

Navigation:

Products CRM > Product Notes > Product Notes

This example illustrates the fields and controls on the Product Notes page.

Field or Control	Description
Search Key Words	Enter keywords to select notes for reporting.
Print On Documents	Not applicable for product notes.

Entering and Viewing Notes

This topic discusses how to enter and view notes.

Note: Because Notes pages are always accessed within the context of a component (such as an order capture or campaign), navigational paths are not listed in this table. For the navigational path, refer to the component documentation.

Pages Used to View and Enter Notes

Page Name	Definition Name	Usage
Notes List - Lead Notes Page	RB_NOTES_LIST_LEAD	View a list of lead notes and access note details.

Page Name	Definition Name	Usage
Notes List - Opportunity Notes Page	RB_NOTES_LIST_OPP	View a list of opportunity notes and access note details.
Notes List - Case Notes Page	RB_NOTES_LIST_CASE	View a list of case notes and access note details.
Notes List -Company Notes Page	RB_NOTES_LIST_CUST	View a list of company notes and access note details.
Notes List - Contact Notes Page	RB_NOTES_LIST_PRSN	View a list of contact notes and access note details.
Notes List - Consumer Notes Page	RB_NOTES_LIST_CONS	View a list of consumer notes and access note details.

Page Name	Definition Name	Usage
Notes Page	PROD_ATT	Create or update notes and add attachments.
	RA_CAMPAIGN_NOTES	
	RA_CONTENT_NOTE	
	RA_LIST_NOTE	
	RA_OFFER_NOTE	
	RB_EMAIL_NOTE	
	RC_CASE_NOTE	
	RC_CASE_RSLN_NOTE	
	RC_SOLN_NOTES	
	RD_NOTES	
	RE_NOTES	
	RE_NOTE_SUMMARY	
	RF_RMA_NOTE	
	RO_NOTE	
	RF_SERVICE_NOTE2	
	RF_SO_NOTE2	
	RF_SO_RSLN_NOTE	
	RQ_DEFECT_NOTES	
	RG_CHANGE_NOTE	
	RSF_LEAD_NOTES	
	RSF_OPP_NOTES	

Notes List -Company Notes Page

Use the Notes List -Company Notes page (RB_NOTES_LIST_CUST) to view a list of company notes and access note details.

Navigation:

Customers CRM > Notes List > Company Notes

This example illustrates the fields and controls on the Notes List - Company Notes page: Note Details tab.

Note Details

Select the Note Details tab.

Field or Control	Description
	Click the **View Detail** button to transfer to the Notes page of the corresponding component to view note summary and details. You can return to the notes list from the Notes page using the **History** field.

Note Summary

Select the Note Summary tab.

This example illustrates the fields and controls on the Notes List - Company Notes page: Note Summary tab.

This section displays the customer or contact name of the note and its note subject.

Notes Page

Use the Notes page (PROD_ATT) to create or update notes and add attachments.

Navigation:

The object name, navigation path, and page appearance varies by component. Refer to the documentation for each parent component.

Note: This sample page shows the Notes page of the Company component. The fundamental appearance and behavior of the Notes page is similar throughout PeopleSoft CRM. Be aware, however, that the Notes page for some components (such as for the Support Case) also contains a rich-text editor that provides options for formatting the text. Refer to the product documentation for each parent component.

This example illustrates the fields and controls on the Notes page of the Company component.
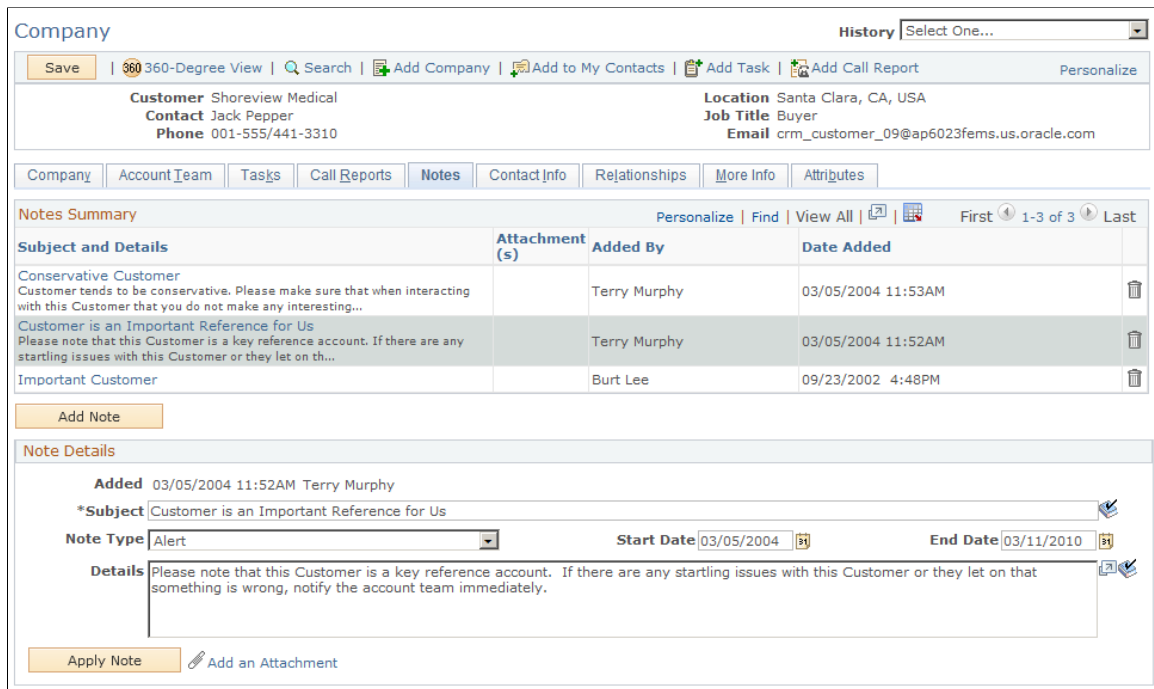
Notes Summary

A summary of existing notes for the component appears in this page region. If there are attachments for the note, the number of attachments appears in the **Attachments** column.

Field or Control	Description
Email	Select a note from the list and click this button to compose and send an email using the Outbound Notification page. Any attachments associated with the note will be made available on the Outbound Notification page for inclusion in the email.

Field or Control	Description
View	Select a note from the list and click this button to view the note details.
Add Note	Click this button to add a new note to the transaction.

Note Details

If no notes exist for the component, this page region is titled **Add Note.** and contains only an **Add Note** button.

Field or Control	Description
Subject	Enter a short summary of the note. If you do not enter a value, the system enters the first fifty characters of the **Details** field into this field when you save the note.
Note Type	Select a classification for the note. Values are defined differently depending on the parent object. This functionality is not available in all components. See Note Types.
Contact Information	Used in Call Center case notes to identify a contact to be associated for this specific note.
Details	Enter the full text of the note.
Apply Note	Click to update the Notes Summary list with the note that you entered. **Note:** Click the **Apply Note** button to add the note to the Notes Summary grid. The note is not saved to the component until you save the component.
Add an Attachment	Click to add an attachment to the note.

Adding Attachments to Notes

This topic discusses how to add attachments to notes.

Selecting a File to Add as an Attachment

To add an attachment to a note:

1. Access the Notes page for the object to which you are adding an attachment.

   Note: Normally you add attachments to notes. In the Product component, however, you add attachments directly to the product.

   ---

2. Click the **Add an Attachment** button.

   Enter the full path (including the file name) of the file to attach.

3. In the dialog box that appears, enter the full path name of the file to attach, or browse to the file.

4. Click the **Upload** button.

   The system uploads the specified file to the server that is configured to store all of the PeopleSoft CRM attachments. Large files may take a long time to upload. When the upload is complete, the system displays the Notes page again. If the upload was successful, the file appears on the page.

5. Add descriptive information about the file.

   If the parent object is a note, you can also use the note to record a longer comment about the attachment.

6. Save the component.

Chapter 6

Using Interactive Reports

Understanding Interactive Reports

This topic discusses:

- Interactive reports and the Analytic Calculation Engine.

- Delivered report and query definitions.

Interactive Reports

PeopleSoft Customer Relationship Management (PeopleSoft CRM) interactive reports are based on the PeopleSoft business analysis modeler tool Analytic Calculation Engine (ACE).

Use the interactive reports to view transactional data in multidimensional online reports. For example, a PeopleSoft Call Center business analysis modeler report might have two dimensions: customer and product. This enables users to display the number of cases in four ways—customer, product, customer within product, or product within customer.

Interactive reports can have more than two dimensions, which enable users to organize data in a variety of ways that serve various business purposes. Users drag and drop the available dimensions to reconfigure the report view as they use it. For example, in viewing a call center report, a user might add another available dimension such as *month* as a third dimension.

Users can filter interactive report data by selecting a single value for any dimension. For example, a user can limit a report so that only cases for one customer, organized by product and then by month, appear. This filtering capability provides the user with an overview of the products that are giving the customer trouble, as well as whether the number of cases that are reported against each product is decreasing or increasing.

Access to an Interactive Report is controlled by user roles. The user can export report data to Microsoft Excel or print a hard copy. While you can interact with these reports by modifying data and moving data elements (dimensions) on the reports, the communication between the report and PeopleSoft CRM is one-way—changes you make to interactive report data are local only, and do not affect the original source data in the PeopleSoft CRM database. Also, you cannot transfer from an interactive report to any PeopleSoft CRM components in order to access data.

PeopleSoft ACE is a PeopleTools product. For information on installing and setting up interactive reports using ACE, see the following references listed.

See *PeopleTools: Analytic Calculation Engine* product documentation.

Delivered Report and Query Definitions

PeopleSoft CRM provides these interactive report definitions:

Report Description	Application
Campaign Performance Forecast	Marketing
Dialog Performance Forecast	Marketing
Dialog Survey Report	Marketing
Workforce Survey Analysis	Marketing
Service Level Management	Support
Service Operations Analytics	Support
Utilization Rate	FieldService
Service Order Summary	FieldService
Service Order Aging	FieldService
Change Request Metrics	HelpDesk
Forward Schedule of Changes	HelpDesk
Service Level Agreement	HelpDesk
Enterprise Order Metrics	Order Capture
Enterprise Order Revenue	Order Capture
Order Revenue	Order Capture
Order Metrics	Order Capture
Sales Compare of Forecasts	Sales
Sales Activity Forecasts	Sales
Dialog Performance Report	Online Marketing

Each report has an accompanying query definition that is similarly named to the report definition.

Launching Interactive Reports

Each PeopleSoft CRM application that delivers an interactive report provides documentation for viewing that specific report.

See the appropriate product documentation:

- "Understanding Interactive Reports" (PeopleSoft Call Center Applications) in the *PeopleSoft CRM: Call Center Applications* .

- "Understanding CRM Interactive Reports" (PeopleSoft Order Capture Applications) in the *PeopleSoft CRM: Order Capture Applications*

- "Understanding Workforce Reports" (PeopleSoft Workforce Communications)

  in *PeopleSoft CRM: Workforce Communications*

- "Understanding Interactive Reports" (PeopleSoft Sales)

  in *PeopleSoft CRM: Sales*

- "Understanding Interactive Reports" (PeopleSoft Marketing) in *PeopleSoft CRM: Marketing*

- "Understanding PeopleSoft Integrated FieldService Interactive Reports" (PeopleSoft Integrated FieldService) in *PeopleSoft CRM: Integrated FieldService*

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Chapter 7

Setting Up Currencies

Understanding Currencies

This topic discusses:

- Currency management in PeopleSoft Customer Relationship Management (PeopleSoft CRM).

- Direct and indirect rate quotations.

- Triangulation.

- Automatic reciprocation of quote methods.

Currency Management in PeopleSoft CRM

PeopleSoft CRM enables you to manage financial information in multiple currencies and perform currency conversions. The Currency Code table that PeopleSoft CRM delivers defines many common currencies that are identified by the International Standards Organization (ISO) standard, including the European common currency (euro). You can update the currency definitions on this table or enter new ones.

Note: The Currency Code table supports the ISO standard of zero, two, and three decimal positions.

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation to provide you with flexible tools to convert and manage multicurrency operations. The currency quotation method controls how a stored rate appears and how an entered rate is interpreted and stored in the database.

You can set up a currency quotation method for each from and to pair of currencies that you use. Define currency quotation options before entering and calculating rates.

Direct and Indirect Rate Quotations

An exchange rate is the price of one currency, such as the British pound, in terms of another currency, such as the U.S. dollar. Exchange rates are quoted directly or indirectly. Most countries use the direct method. With this method, the exchange rate indicates how much of the local currency is exchanged for one unit of the foreign currency. For example, suppose that one has to pay .6326 pounds to obtain one dollar, the direct quotation is 1 USD = .6326 GBP.

With the indirect method the exchange rate is expressed as the amount of foreign currency that is required to purchase one unit of the domestic currency. In the preceding example, the indirect quotation is 1 GBP = 1.5814 USD.

Triangulation

Triangulation is used in hyperinflationary environments in which all conversions to the local currency are done through a reference currency—a stronger, more stable currency, such as the U.S. dollar.

For currency pairs that triangulate, you do not typically maintain rates online. Instead, the Cross Rate/ Triangulation Generation SQR (Structured Query Report) uses these three exchange rates:

- The rate between the from and reference currencies.

- The rate between the reference and to currencies.

- The cross rate between the from and to currencies.

Typically, you do not maintain these rates directly.

Set up the currency quotation methods correctly to yield the correct results for triangulation. Two fields store the rate conversion factor: RATE_DIV and RATE_MULT. With these in mind, the currency conversion formula is always (From currency / RATE_DIV) * RATE_MULT = To currency.

For example, converting from the Russian rouble (RUR) to the Brazilian real (BRL) through the U.S. dollar (USD) is a two-step conversion. First, the RUR is converted to the USD using the appropriate triangulated rate (which uses the RUR to USD component of the triangulated rate that is stored in RATE_DIV). Second, the USD is converted to the real by using the fixed exchange rate (which uses the USD to BRL component of the triangulated rate that is stored in RATE_MULT).

It was a legal requirement to use triangulation to convert currencies participating in the euro prior to January 1, 2002. Even after an enterprise has switched over to the euro, it is necessary to keep historical data available in the national currency unit in order to maintain an audit trail. In most countries, national law requires enterprises to keep accounting records in their original form for at least 5 to 10 years. This is important to avoid synchronization problems between the legacy and the converted systems. For example, representing amounts dated before the euro came into existence in euro could cause anomalies when comparing data that was collected during the floating-rate era before January 1, 1999.

Conversion of historical data requires that you convert all instances of the same data in exactly the same way. This can cause rounding differences with non-normalized data, as is commonly the case in data warehouses that support management information systems (MIS) or decision support systems (DSS). Each organization must decide how significant such differences are in the context of the data use, which might be merely for internal trend analysis.

Automatic Reciprocation of Quote Methods

The Currency Quotation Method page automatically reciprocates itself. For example, if you define the conversion of USD to GBP as indirect, the system automatically creates this record to indicate a quote method of direct. If you change the quote method on the GBP to USD record, the system automatically updates the USD to GBP record.

This table lists each possible value with its reciprocal value:

Page Element	Value (for RUR to BRL)	Reciprocal Value (for BRL to RUR)
Rate Quotation Basis	Direct Indirect	Indirect Direct
Quote Units	Any value	Same value
Rate Decimal Positions	4 (default value)	Same value
Auto Reciprocate	Yes No	Yes No
Triangulate	Yes No	Yes No
Reference Currency	Any value	Same value
Primary Visual Rate	From - To (RUR - BRL) From - Reference (RUR - USD) Reference - To (USD - BRL)	From - To (BRL - RUR) Reference - To (USD - RUR) From - Reference (BRL - USD)
Cross-Rate Allow Override	Yes No	Yes No
Cross-Rate Recalculate	From - Reference (RUR - USD) Reference - To (USD - BRL)	Reference - To (USD - RUR) From - Reference (BRL - USD)

Setting Up Currencies

To set up currencies, use the Currency Code (CURR_CD_TABLE) and Currency Quotation Method (CURR_QUOTE_PNL) components.

This topic discusses setting up currencies in PeopleSoft CRM.

Pages Used to Set Up Currencies

Page Name	Definition Name	Usage
Currency Code Page	CURRENCY_CD_TABLE	Add or update a currency code.

Page Name	Definition Name	Usage
Currency Quotation Method Page	CURR_QUOTE_PNL	Set up and maintain a currency quotation method for each from currency and to currency pair.

Currency Code Page

Use the Currency Code page (CURRENCY_CD_TABLE) to add or update a currency code.

Navigation:

Set Up CRM > **Common Definitions** > **Currency** > **Currency Code** > **Currency Code**

This example illustrates the fields and controls on the Currency Code page.

Field or Control	Description
Currency Symbol	Enter a currency symbol. You can change the currency symbol that is delivered with the application or enter new symbols for currencies.
Scale Positions	Enter the number of numerals that you want to appear to the left of the decimal. The system rounds numbers accordingly for display, although it actually stores data with full precision in the database. For example, suppose that you want all million dollar amounts to appear as the number of millions without the zeros, enter *6* as the scale position. In this case, 24,000,000 appears as 24, but it is stored in the database as 24,000,000.

Currency Quotation Method Page

Use the Currency Quotation Method page (CURR_QUOTE_PNL) to set up and maintain a currency quotation method for each from currency and to currency pair.

Navigation:

Set Up CRM > **Common Definitions** > **Currency** > **Currency Quotation Method** > **Currency Quotation Method**

This example illustrates the fields and controls on the Currency Quotation Method page.

Rate Quotation Basis

Field or Control	Description
Direct	Select if you want direct quotes for currency pairs. For example, for a conversion of dollars to euros, a direct quote indicates that 1 USD = x.xxxx EUR. **Note:** You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.

Field or Control	Description
Indirect	Select if you want indirect quotes for currency pairs. For example, for a conversion of dollars to euros, an indirect quote indicates that x.xxxx USD = 1 EUR. **Note:** You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.
Quote Units	Enter any value in this field, although quote units generally have a scale of 10 (such as 10, 100, 1000). The default value for this field is *1*. Quote units, sometimes called scaling factors, are used to preserve decimal position. For example, you might state the exchange rate between roubles and dollars as 1000 RUR = 31.4169 USD instead of 1 RUR = 0.031469 USD.
Auto Reciprocate	Select to have the system automatically create or update the rate for the reciprocal currency pair whenever an exchange rate is added or updated. For example, when you enter a new USD to GBP rate, the GBP to USD rate is updated automatically. You can only automatically reciprocate currency pairs for which quotation methods are established. The check box is selected by default.

Triangulation Options

Use the **Triangulation Options** group box to set up triangulation between currencies.

Field or Control	Description
Triangulate	Select to convert two currencies through a third currency (the reference currency).
Reference Currency	Enter the currency through which the from currency is converted. For example, when the system converts between Russian roubles and Brazilian reals, the reference currency might be the United States dollar.
Primary Visual Rate	Select the primary rate. The primary rate appears on primary pages and reports.

Field or Control	Description
Allow Override	Select to enable users to override the cross rate for a triangulated currency pair. If this check box is cleared, users can only change the components of the triangulated rate. If you select this check box, you must specify which currency pair the system uses to recalculate to keep the triangulation accurate.
Recalculate	Select the method for recalculation.

Calculating Currency Exchange

This topic discusses how to calculate currency exchange.

Page Used to Calculate Currency Exchange

Page Name	Definition Name	Usage
Currency Exchange Calculator Page	CURRENCY_EXCHNG_PN	Calculate the currency exchange between currencies.

Currency Exchange Calculator Page

Use the Currency Exchange Calculator page (CURRENCY_EXCHNG_PN) to calculate the currency exchange between currencies.

Navigation:

Set Up CRM > **Common Definitions** > **Currency** > **Currency Exchange** > **Currency Exchange Calculator**

This example illustrates the fields and controls on the Currency Exchange Calculator page.

Field or Control	Description
Effective Date	Enter the date of the currency conversion. The system uses the rate that is effective on the date that you enter.

Chapter 8

Setting Up Credit Card Encryption

Understanding Credit Card Encryption

PeopleTools Pluggable Cryptography is an advanced security framework that introduces a new security model for applications to encrypt and decrypt credit card data. This feature adds greater security to the credit card data handling system as well as upgrades existing credit card data.

Credit card encryption is available to PeopleSoft CRM implementations that are integrated with PeopleSoft Financials.

Strong Encryption

Pluggable Cryptography protects critical PeopleSoft data and enables more secure data communication with other businesses. It enables you to extend and improve cryptographic support for your data in PeopleTools. By incrementally acquiring stronger and more diverse algorithms for encrypting data, Pluggable Cryptography offers strong cryptography with the flexibility to change and grow.

Enhanced cryptography capability is provided by PeopleSoft pluggable encryption technology (PET), which employs 3DES algorithms and 168-bit encryption keys to secure data.

Features

Applying Pluggable Cryptography to your system:

- Improves the system's ability to protect credit card data during transfer and storage.

- Upgrades existing credit card data.

- Protects data during information display.

Once upgraded, the system displays credit card numbers so as to mask them. Before upgrade, the system displayed all digits of a credit card number, whether display-only or editable. The feature modifies the display to show only the last four digits, replacing each preceding digit with an X.

Standards

PeopleTools Pluggable Cryptography complies with the cardholder data protection requirements of the Payment Card Industry (PCI) Security Standards Council and with Visa's Cardholder Information Security Program (CISP). When you enable this feature, credit card numbers for external third-party payers, such as customers or students, are encrypted.

Note: This feature upgrades credit card numbers that are shared with the PeopleSoft Financials or a third-party database; it does not upgrade those stored internally in the CRM database, such as company-owned or employee credit cards.

See "Securing Data with Pluggable Cryptography" in *PeopleTools: Security Administration* product documentation.

Understanding Credit Card Verification Number Encryption

To enhance the security of credit card transactions, the CRM system supports the inclusion of verification number in the credit card authorization process. A verification number, also known as a card identification number, card authentication value, or card validation code depending on the card company, is a 3-digit or 4-digit code that is printed on the back or the face of the credit card. The number is associated uniquely to the card account number as well as the physical credit card. For transactional components that support credit card payments, a field is available to capture the verification number of the credit card. When a transaction, paid by credit card, is submitted, the specified credit card information and the verification number are sent to the authorization process.

In compliance with the guidelines recommended by the PCI Security Standards Council regarding sensitive authentication data, the verification number is removed permanently from the database once the authorization process completes (passed or failed). In situations where the card data is accepted but not immediately authorized (for example, future dated orders that are saved in the database and not submitted until the order date is reached), the verification number is stored in an encrypted format and is masked with XXX when displayed in the field until the value is deleted after authorization.

Here are a list of transactional components that support credit card payments and accepts verification number for authorization processing:

*   Support Case.

    Credit card transactions are not applicable to HelpDesk and HR HelpDesk cases.

*   Order (agent-facing and customer-facing).

    *   For canceled orders (which can be orders that are not yet submitted, or expired orders that are canceled by a batch process on a regular basis), their saved verification numbers are deleted from the database.

    *   For future dated orders, their verification numbers are stored in the database, and will be removed when the fulfill by date is reached *AND* the orders are submitted.

    *   For bulk orders, credit card information (including the verification number) is transferred to their child orders. Upon submission, the verification number is removed from the database and no longer appears on the parent and child orders.

*   Agreement.

*   Service order.

*   Prepaid account.

    Verification number is not supported in non-prepaid accounts.

Note: Because of its sensitive nature, verification number is not stored or displayed in the section of the Person component where credit card entries are stored, nor it is passed to another system (for example, supply chain system) through integration points.

Integration Technology

PeopleSoft CRM uses the Integration Broker messaging technology (SOAP) to perform credit card authorizations with CyberSource (certified third-party vendor).

To facilitate message exchange between the PeopleSoft and Cybersource systems, an application engine program (CYB_SOAP_REQ) is used to transform authorization request and response messages to the appropriate format for the system that receives them.

The system delivers a node called *PSFT_CYB* in Integration Broker as part of the integration setup. This node contains the Cybersource-specific HTTP connector settings for contacting the authorization servers via SOAP as well as message transformation and routing settings.

Note: This SOAP-based integration uses core Integration Broker functionality that is available in all PeopleTools versions, which ensures backward and forward compatibility without reliance on third-party software support. Because it is a native PeopleTools functionality, it is easier for customers to set up, deploy and maintain.
This integration uses secure SSL (secure sockets layer) encryption.
Customers who use other non-Cybersource third-party vendors for credit card authorizations can also leverage this SOAP solution with few custom modifications. These changes include an updated node definition and routing properties for their vendors, and possibly a new transformation program (or an updated one based on the delivered transformation program) that formats messages circulating between PeopleSoft and their vendors. The underlying Enterprise Components message stubs and transaction triggers remain the same.

To avoid the potential issue of storing and displaying sensitive data in the Integration Broker logs and Service Operations Monitor, the log detail setting in the routing definition for the messages is set to *No Logging* as delivered.

General Settings for Credit Card Authorizations with Cybersource

A system-wide setting is available to make the provision of credit card verification number mandatory for authorization processing. When the setting is enabled, an error message appears if the user fails to enter a verification number when the credit card transaction is being submitted to authorization. In the case of an order, it is put on credit card hold if the verification number is not present.

For security verification purposes, the CRM system requires that the Cybersource user ID, merchant ID and merchant key be provided on the Installation Options page. These fields are included in the SOAP message for security verification during credit card authorization.

See General Options Page.

Cybersource SOAP Connectivity

Refer to the CRM installation guide for more information on how to set up the integration with Cybersource, which includes these high-level steps:

1. Set up the web server with SSL certificate provided by Cybersource and new proxy server setting.

2. Make sure to enter your Cybersource user ID, merchant ID and merchant key information on the Installation Options page.

3. Make sure the *PSFT_CYB* node is set up properly (connector and routing information in particular) and activated.

4. Test the connectivity using the Test Credit Card Interface component.

See PeopleSoft Customer Relationship Management Installation Guide product documentation.

CyberSource Hosted Order Page

To help customers improve data security and reduce liability and effort required to meet security standards for storing sensitive credit card data, CRM provides a hosted payment option in which all payment processing is handled on a third party hosted website.

The feature *Third-Party Storage and Payment Hosting* integrates the Online Marketing (OLM) Dialog Execution Server (DES) with the CyberSource Hosted Order Page (HOP). HOP refers to the third-party where payment processing takes place allows a dialog to be presented to a consumer which allows them to provide payment as part of the dialog flow. The payment process takes place on a third-party system which returns receipt details to online marketing. Only receipts details are stored in the PeopleSoft database. In CRM, an installation option is available for customers to decide if they want to switch to the hosted payment option, or remain on the current CRM methods of payment entry, transmission, and storage. Currently, credit card data is encrypted, stored and maintained in the PeopleSoft database records. In CRM, an installation option is available for customers to decide if they want to switch to the hosted

payment option, or remain on the current CRM methods of payment entry, transmission, and storage.

If the hosted payment option is selected, the system takes the input from each component and transfers control of the transaction to a third-party hosted site, CyberSource. Users are then transferred within the current browser window to the card processor's site during checkout where they will enter their card data for approval.

Note: Once the option is selected for Hosted Order Page, you cannot return to SOAP option.

Related Links
"Credit Card Information Page" (PeopleSoft Call Center Applications)
"Order - Entry Form Page or Quote - Entry Form Page" (PeopleSoft Order Capture Applications)
"Checkout - Shipping and Payment Page" (PeopleSoft Order Capture Applications)
"Setting Up Credit Card Integration" (PeopleSoft Order Capture Applications)

Implementing Credit Card Encryption

You must perform these tasks to implement the new functionality:

1. Make sure that the PeopleSoft Financials database that you integrate with is set up to support credit card encryption.

2. Secure the credit card component.

   See Securing the Credit Card Component.

3. Upgrade existing credit card data.

   See PeopleSoft CRM Upgrade documentation, "Complete Database Changes," Encrypting Credit Card Data

   Contact Global Support before attempting to upgrade your data, if you have customized your system in any of the following ways:

   • Added any records containing credit card number fields.

   • Added a credit card number field to any records.

   • Deleted any records found in the grid on the Upgrade Credit Card Numbers component.

   • Deleted a credit card number field from any records found in the grid on the Upgrade Credit Card Numbers component.

   • Customized the credit card encryption processing functionality in any way.

   • Changed whether or how any particular credit card field is encrypted.

4. Change the credit card encryption key.

   See Changing the Credit Card Encryption Key.

Securing the Credit Card Component

You must specify the user roles that have access to credit card components.

Securing the components involves these general steps:

1. Add the Credit Card Component menu (CCENCRYPTION_MENU) to the appropriate permission list.

   See Adding CCENCRYPTION_MENU to a Permission List.

2. Provide security for the new credit card components:

   See Providing Security for Credit Card Components.

   • FS_CC_UPGRADE

   • FS_CC_CNVRT

3. Provide security to the new portal registries:

   See Providing Security for the Portal Registries.

   • CREDIT_CARD_ENCRYPTION (Credit Card Encryption folder)

   • FS_CC_UPGRADE_GBL (Upgrade Credit Card Numbers content registry)

   • FS_CC_CNVRT_GBL (Change Encryption Key content registry)

4. (Optional) Change the security group for the FS_CC_CNVRT Application Engine process definition.

    See Changing the Security Group (Optional).

5. Run the portal security synchronization process (PeopleTools, Portal, Portal Security Sync).

6. Clear the application and web server caches.

Adding CCENCRYPTION_MENU to a Permission List

You must add CCENCRYPTION_MENU to the appropriate permission list. You may want to choose a security administration role.

See "Setting Up Permission Lists," Managing Permission Lists" in *PeopleTools: Security Administration* product documentation.

Providing Security for Credit Card Components

To provide access to the new PeopleSoft components:

1. Navigate to **PeopleTools** > **Security** > **Permissions & Roles** > **Permission Lists** > **Pages.**

2. Add the menu name CCENCRYPTION_MENU.

3. Click Edit Components.

    The Components page appears.

4. Locate the FS_CC_UPGRADE component to which you want to grant access.

    (By default, no components are authorized when adding a menu.)

5. Click the **Edit Pages** button for each component to which you want to grant access.

    The Page Permissions page appears.

6. Specify the actions that a user can complete on the page.

7. Click OK on the Page Permissions page, and then again on the Component Permissions page.

Note: Perform this procedure twice, once for the FS_CC_UPGRADE component and again for the FS_CC_CNVRT component.

See "Setting Up Permission Lists" in Peopletools Security Administration product documentation.

Providing Security for the Portal Registries

You must provide security for the new folder and content registries on the portal.

For *Folder:*

1. Navigate to **PeopleTools** > **Portal** > **Structure and Content.**

2. In the Folders list, click on the links Set Up CRM, then Utilities.

3. Click the Edit link next to the Credit Card Encryption folder name.

4. Click the Folder Security tab.

5. On the Folder Administration page, select the permission lists that you want to have access to the Credit Card Encryption menu.

For *Content Registries:*

1. Navigate to PeopleTools, Portal, Structure and Content.

2. In the Folders list, click on the links Set Up CRM, then Utilities, then Credit Card Encryption.

3. Click the Edit link for Upgrade Credit Card Numbers (FS_CC_UPGRADE_GBL).

4. On the Security tab, make sure the permission list displayed corresponds to the CCENCRYPTION_MENU permission list.

5. Repeat steps 3 and 4 for Change Encryption Key (FS_CC_CNVRT_GBL).

Note: When you complete all security tasks, delete your browser cache so that you can view the new portal registries in the menu navigation.

See "Administering Portals" in *PeopleTools: Portal Technology* product documentation.

Changing the Security Group (Optional)

You can optionally change the security group for the FS_CC_CNVRT Application Engine process definition.

To change the security group:

*   Navigate to **PeopleTools** > **Process Scheduler** > **Processes.**

*   Select *Process Name* in the **Search By** field.

*   Enter *FS_CC_CNVRT* in the **begins with** field.

*   Click the **Search** button.

*   On the Process Definition page, select the Process Definition Options tab.

*   Modify the security group in the **Process Groups** grid.

Changing the Credit Card Encryption Key

This topic describes how to change the credit card encryption key.

You can change the credit card encryption key at any time.

Page Used to Change the Encryption Key

Page Name	Definition Name	Usage
Credit Card Number Re-Encrypt Page	FS_CC_CNVRT	Change the key used to encrypt credit card numbers. Run the utility to re-encrypt credit card numbers using a new encryption key.

Re-Encrypting Credit Card Data

To change the encryption key at any time after the initial conversion, you must first re-encrypt all credit card data.

To re-encrypt credit card data:

1. If this is the first re-encryption following the initial conversion and you have not secured the FS_CC_CNVRT component, complete the steps in the "Securing the Credit Card Components" section in this topic.

   See Securing the Credit Card Component.

   Complete the steps for the FS_CC_CNVRT component only. Securing FS_CC_CNVRT secures both the FS_CC_CNVRT component and the FS_CC_CNVRT portal registry.

2. Navigate to **Set Up CRM** > **Utilities** > **Credit Card Encryption** > **Change Encryption Key.**

3. Click the *Generate Random Key* button to generate a new random hexadecimal encryption key.

   Clicking this button generates a new, random hexadecimal encryption key. You can modify this key, but you must format it as a 24-byte string in hexadecimal notation. The first two characters must be *0x,* and the remainder must be exactly 48 characters and consist of both numeric digits and the lowercase letters *a* through *f.*

4. If the values in the Re-encrypt Action column are not *Decrypt, then Encrypt,* click the **Crypt Action** button until *Decrypt, then Encrypt* appears in the column.

5. Click the **Run** button to start the conversion process.

   The Credit Card Conversion process converts each field in the grid. If the process fails for any reason, you can restart the process; it will resume where it stopped. If you can not restart the process, run it from the beginning. The system will bypass fields that have already been processed.

Credit Card Number Re-Encrypt Page

Use the Credit Card Number Re-Encrypt page (FS_CC_CNVRT) to change the key used to encrypt credit card numbers.

Run the utility to re-encrypt credit card numbers using a new encryption key.

Navigation:

Set Up CRM > **Utilities** > **Credit Card** > **Change Encryption Key**

This example illustrates the fields and controls on the Credit Card Number Re-Encrypt page.
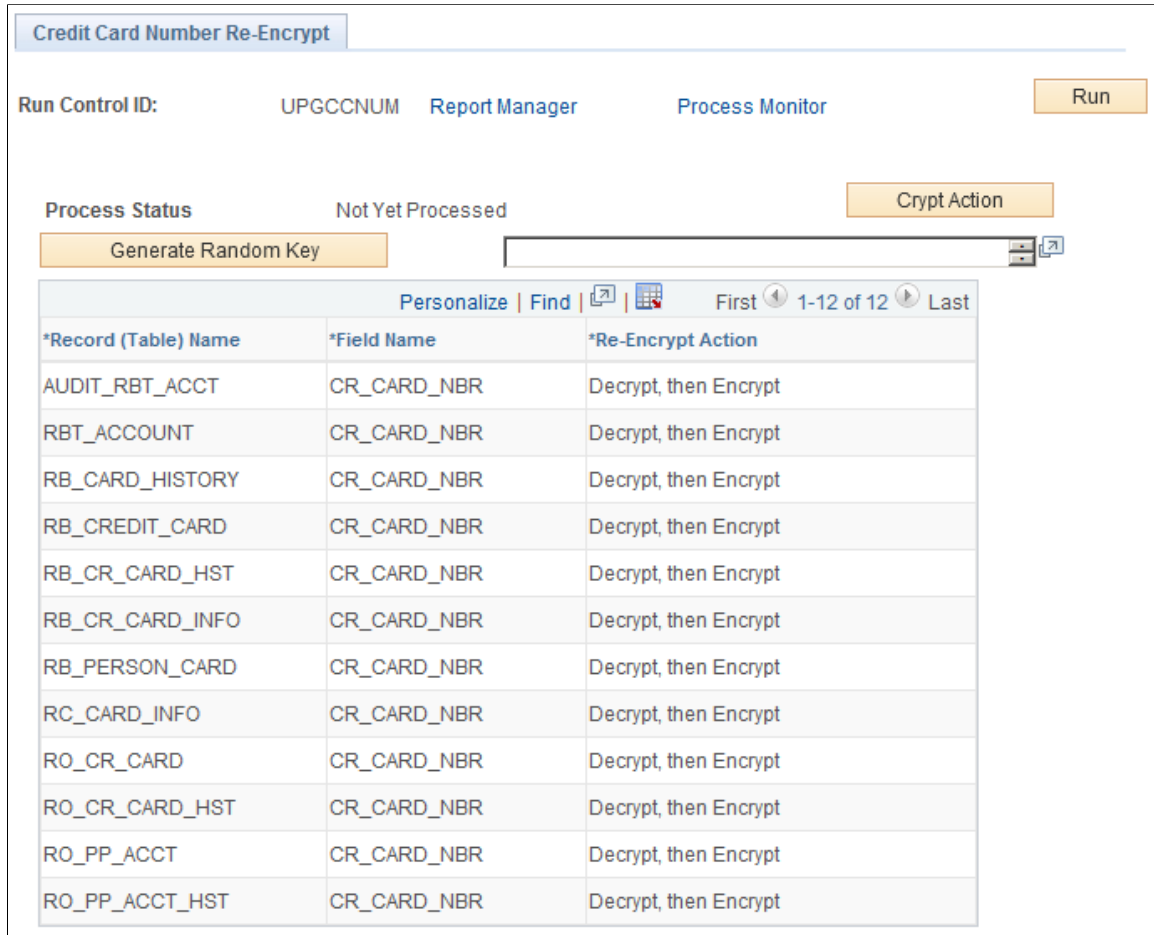
Field or Control	Description
Crypt Action	Toggle the value in the Re-Encrypt Action column in the grid.
Generate Random Key	Generate a random key in the format needed by the encryption algorithms used for credit card encryption and decryption profiles.
(Encryption key)	If you want to modify the generated key or enter your own, you must format it as a 24-byte hex string. The first two characters must be *0x* and the remainder must be exactly 48 characters that consist of both numeric digits and the lowercase letters *a* through *f*.
Record (Table) Name	Displays the record name.
Field Name	Displays the field name.

Field or Control	Description
Re-Encrypt Action	Values include: • *Decrypt, then Encrypt:* Re-encrypt data currently encrypted with the Pluggable Cryptography credit card encryption profile. • *No Action:* Indicates that the utility has converted the record. If an error occurs and you rerun the process, records for which No Action is displayed are not reprocessed.

Synchronizing Re-Encrypted Data With PeopleSoft Financials

Any change in CRM data requires that it be propagated to the PeopleSoft Financials database, which is described in the PeopleSoft product documentation for your software release.

For additional information, see "Performing a Full Data Publish of Current Effective Data" in *PeopleSoft 9.2: Integration Interfaces* product documentation.

Related Links
"Understanding Enterprise Integration Technology" (Business Object Management)
"Data Integrations" (Business Object Management)
"Integrating with PeopleSoft Financial Management Services" (PeopleSoft Integrated FieldService)

Chapter 9

Implementing Alternate Character

Understanding Alternate Character

This topic discusses:

- Alternate character functionality.

- Alternate character display.

- Alternate character searches.

Related Links
"Understanding the Company Component" (Business Object Management)
"Understanding Persons" (Business Object Management)

Alternate Character Functionality

PeopleSoft Customer Relationship Management (PeopleSoft CRM) provides alternate character functionality that supports the need in Japanese and Cantonese (Hong Kong) markets to represent proper nouns phonetically and in their native formats. This functionality enables PeopleSoft CRM to validate double-byte characters in alternate character fields.

To implement alternate character functionality, you must have installed a Japanese- or Cantonese-enabled database and a double-byte-enabled operating system. The alternate character architecture and the related language table architecture enable users to enter data using both single-byte and double-byte character sets and to switch between a base language table and a related language table to view information in either single-byte or double-byte characters.

For example, users who enter data in Japanese require functionality that enables them to enter proper nouns, such as names or addresses, both in kanji and by using a phonetic double-byte character set, such as hiragana. The alternate character architecture also supports phonetic sorting rather than binary sorting on proper nouns for languages that require the use of two-character sets to enter proper nouns.

Alternate Character Fields

In an alternate character-enabled system, alternate character fields appear in company and person names and addresses.

Labels for alternate character fields differ depending on the component and the field. For example, the **Alt Char Name** appears in the Company component for entry of the company name in alternate character format. The rules that the system used to determine if alternate character fields appear on pages vary depending on the type of alternate character information that you enter:

- Company name.

In an alternate character-enabled system, the alternate character field for a company name always appears, whether or not it has a value. This does not depend on the country setting for the company.

- Person name.

  The **alternate character** field appears on a page only if the country format is Japan or Hong Kong. You cannot view the alternate character field if one of these countries is not selected.

  Pages that display personal name fields usually display them in first name, last name order. For Japanese and most Southeast Asian languages, however, personal name fields appear in the last name, first name order. A space, not a comma, separates the last and first names—the Name field displays the last name[space]first name, not last name,first name.

- Address (for both companies and persons).

  The alternate character fields appear on the Update Address, the Address Book Entry Details and the Quick Create pages. They do not appear on the Address Book list page or on the summary address information that appears on the primary page for a business object.

  See "Understanding Name and Address Information in CRM" (Business Object Management).

Note: The alternate character display is determined by the country code that is specified for the business object, not by the country code that is defined as a user preference for the user.

Alternate Character Searches

After you establish alternate character information, you can use the **alternate character** fields as search criteria in the Business Object search component or the Configurable search.

See "Understanding the Business Object Search and Quick Create Process" (Business Object Management).

Configuring the System for Alternate Character Usage

This topic discusses how to configure the System for Alternate Character Usage.

Pages Used to Configure the System for Alternate Character Usage

Page Name	*Definition Name*	*Usage*
Installation Options - Alt Character Page	ALT_CHAR_PNL	Set up the alternate characters that the system uses for a specific language code.
User Preferences - Overall Preferences Page	OPR_DEF_TABLE_RB1	Enable alternate character functionality for a user.

Page Name	Definition Name	Usage
Field Page	RBQ_FLDDFN	Enable business object searches and quick creates to use alternate characters for a specific field.

Installation Options - Alt Character Page

Use the Installation Options - Alt Character page (ALT_CHAR_PNL) to set up the alternate characters that the system uses for a specific language code.

Navigation:

Set Up CRM > Install > Installation Options > Alt Character

This example illustrates the fields and controls on the Installation Options - Alt Character page.

Field or Control	Description
Language Code	Select a language code to which you can assign an alternate character value.
Alternate Character	Select the character set for the language code. Values are: *Alphanumeric, Alphanumeric with Latin-1 Ext, Any, DB Any Characters (Kanji), Double Byte Hiragana, Double-Byte Katakana,* and *Single Byte Katakana.* The system uses the character set that is assigned to a user's language code to display alternate character-enabled fields to the user.

User Preferences - Overall Preferences Page

Use the User Preferences - Overall Preferences page (OPR_DEF_TABLE_RB1) to enable alternate character functionality for a user.

Navigation:

Set Up CRM > User Preferences > Overall Preferences

See Understanding Alternate Character, Overall Preferences Page.

Field Page

Use the Field page (RBQ_FLDDFN) to enable business object searches and quick creates to use alternate characters for a specific field.

Navigation:

Set Up CRM > **Common Definitions** > **Customers** > **BO Search** > **Field** > **Field**

Select the **Is Alternate Character Field** field.

See "Adding and Modifying BO Search and Quick Create Definitions" (Business Object Management).

Chapter 10

Setting Up Auditing for Cases and Inbound Email

Understanding Audit Information

This topic discusses:

- History versus auditing.

- The audit record.

Important! PeopleSoft delivers the system with auditing features disabled. Because enabling auditing can negatively impact application performance, you should analyze audit needs carefully and enable auditing only when there is a strong business reason to do so.

History Versus Auditing

PeopleSoft CRM tracks events that occur in cases and emails using a feature called the Active Analytics Framework. You can view a summary of these tracked events on component history pages. For each tracked event, a corresponding audit trail record stores details of changes and is used to display details of the changes.

Use the following pages to review history information in the Case component and in the Inbound Email component:

- Case History page

  The Case History page lists information about major events in the life of the case, including a description of the event and details of field changes that are associated with the event. You can define case history events using complex conditional statements. For example, you can configure the case history so that changes to a field only appear if the field changes to or from a particular value.

  You set up case history processing using the active analytic framework.

- Email History page

  The Email History page lists email history events that are captured by the active analytic framework. You can use this page to review email event history, routing history, and audit trail information.

Both history pages offer access to a detailed audit trail page that displays record-level changes. You can specify the fields in the record to audit and the types of changes to capture (add, update, display, or delete). You cannot incorporate logic based on the value of the fields; the system captures changes without regard to the data that changes.

See *PeopleTools: Application Designer Developer's Guide* product documentation.

Related Links

"Reviewing Case History" (PeopleSoft Call Center Applications)
"Understanding ERMS Setup" (PeopleSoft Multichannel Applications)

The Audit Record

The audit record stores audit trail data. The structure of this record determines the fields that get audited. The audit record for the Case component, RC_CASE_AUDIT, stores information from both support cases and help desk cases. The RB_INEM_AUDIT record stores information for the Search Inbound Emails component (the email workspace).

The audit record consists of these elements:

1. Audit record key fields.

   These fields hold information that is specific to the audit action.

2. The key fields for the records to audit.

   These are alternate key fields in the audit record.

   Cases are based on several records; the audit record includes the key fields for every record that is audited. The BUSINESS_UNIT key field, however, is not on the audit record even though BUSINESS_UNIT is a key to the main case record, RC_CASE, and to each of its child records. This is because case numbers are unique across all business units, and the value in the **CASE_ID** field is enough to uniquely identify the case.

3. The fields to audit.

   If a field appears in more than one record, changes to both records are audited. For example, the **RC_DECSRLONG** field appears in both RC_CASE and RC_CASE_NOTE. By including this field in the audit record, you ensure that changes to both the case description and the note description are audited.

This is the audit record architecture for RC_CASE_AUDIT:

This diagram shows the audit record architecture for RC_CASE_AUDIT.
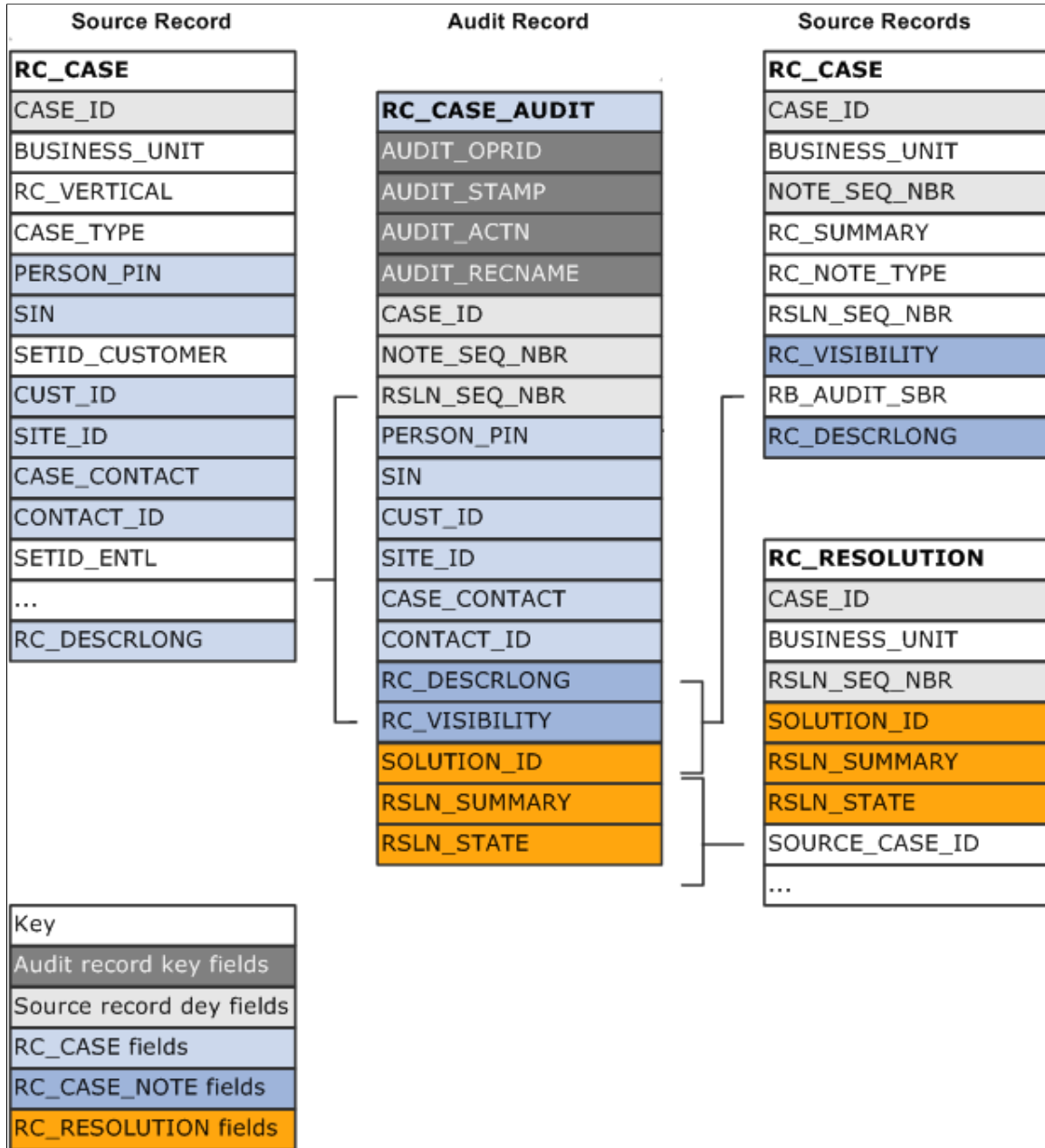
The left and right columns list the records that are audited, or *source records.* The middle column lists the audit record.

Note: This diagram is an example only. Use PeopleSoft Application Designer to review the actual record structures for cases.

Before you turn on auditing, review the record structure so that you know which fields get audited.

To change the fields that get audited, use PeopleSoft Application Designer to modify the RC_CASE_AUDIT record definition or the RB_INEM_AUDIT record definition.

Important! PeopleSoft does not support modifications to the audit record definitions.

Setting Up Case and Email Auditing

To choose actions to audit, use the Audit - Setup (RC_COMP_AUDIT) component.

This topic discusses how to set up case auditing.

Page Used to Set Up Case Auditing

Page Name	Definition Name	Usage
Audit - Setup Page	RC_COMP_AUDIT	Choose which actions (add, change, and delete) to audit.

Audit - Setup Page

Use the Audit - Setup page (RC_COMP_AUDIT) to choose which actions (add, change, and delete) to audit.

Navigation:

Set Up CRM > **Common Definitions** > **Audit Trail - Setup** > **Audit - Setup**

This example illustrates the fields and controls on the Audit - Setup page.

Field or Control	Description
Component Name	Enter the object name of the component. PeopleSoft delivers entries for RC_CASE (the Case component) and RB_EM_IB (Search Inbound Emails component). Although you configure auditing at the component level, the processing occurs at the record level. Therefore, when multiple components are based on the same record, the system captures data changes regardless of which component the user was in when making the change. For example, the auditing that you establish for the RC_CASE component is also valid for the self-service case components, which are based on the same records.
Audit Record Name	Enter the record where the system stores information about data changes. The structure of this record determines which fields get audited.

Record - Audit Options

The fields in the **Record - Audit Options** region enable you to select which actions (add, change, and delete) to capture for each record that you audit. The selections apply to all audited fields in the specified record. You cannot set any field-level auditing options; all fields in a record must use the same auditing rules. To set field-level auditing options, you must redefine the audit record using PeopleSoft Application Designer.

When you activate auditing on the Audit Setup page, you turn on auditing only for the fields that are included in the audit record (RC_CASE_AUDIT or RB_INEM_AUDIT—the record that stores the audit trail data.

All auditing is based on differences between the field values at the time that the component is opened and at the time that the component is saved. If a user saves several times while working in a component, each save triggers auditing activity.

Field or Control	Description
Record (Table) Name	Enter the record that is associated with the audited component. For example, the Case component includes data from several records.

Field or Control	Description
Add	Select to have the system capture the change every time a value is added to a field that is audited. A value is considered as added in two situations: • When data is in the field the first time that you save a new row of data. For example, if you create a new case, the values in all populated fields are considered as added the first that time that you save that case. • When you save data in a field that was previously null.
Change	Select to have the system capture the change every time the value of an audited field is updated. A value is considered updated when a new non-null value is different from the previous non-null value.
Delete	Select to have the system capture the change every time the value of an audited field is deleted. A value is considered deleted when a null value replaces a non-null value.
Show Field Label	Select to have the runtime audit page display the field labels rather than the field's object name. For example, if you're auditing the **RC_PRIORITY** field, selecting this option causes the audit page to refer to this field as *Priority* rather than *RC_PRIORITY.* If this check box is clear, the audit page displays field values. If the audited field has translate values, the translate long value appears.

Chapter 11

Running Diagnostic Reports

Understanding PeopleSoft CRM Diagnostics

CRM diagnostics consist of seven PeopleSoft application packages, or plug-ins, that can help to troubleshoot the PeopleSoft CRM system setup or integration related problems. When you report a problem to the PeopleSoft Global Services Center, the support representative might ask you to run a diagnostic package to determine how the system is set up.

The delivered diagnostic packages are sufficient to diagnose most system problems. To develop additional diagnostic packages that meet installation-specific needs, use the PeopleTools Application Designer.

See *PeopleTools 8.52: PeopleSoft Application Designer Developer's Guide*

See *PeopleTools 8.52: PeopleSoft Application Designer Lifecycle Management Guide*

PeopleSoft CRM diagnostic packages produce reports that appear at the workstation or are emailed to you. You can run the following seven diagnostic packages:

Package Name	*Purpose*
DIAG_CMSETUP	Displays information about correspondence management installation and setup: • Merge Server Definition. • Merge Server Printers. • Setup Merge Server. • Install Options. • FTP URL Details for Correspondence Management. • Process Scheduler Server Names for Correspondence Management Jobs. • Process Scheduler Server Details.
DIAG_EIPGATEWAYINFO	Queries the connection URL and displays information about multiple gateways, if multiple gateways are set up.

Package Name	*Purpose*
DIAG_EIPMESSAGENODES	Displays information about node definition: • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Status (active, inactive).
DIAG_EIPMESSAGES	Displays information about EIP messages that is sorted by the different application names: • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Message handler. • Message handler type. • Status (active, inactive).
DIAG_SEARCHBUILDSETUP	Displays the following: • Information about the last search build. • Run control information. • Search parameters for CRM_RB_SRCHDB. • Search records. • Search records and fields.
DIAG_DATASETRULES	Displays information about Data Set Rules: • Data Set Rules Name. • Status Active. • Search Record. • Rule Condition. • SQL.

Package Name	Purpose
DDIAG_PRODCATALOG	Displays information about Product Catalog through input prompt of SETID: • List of Products. • Catalog Details. • Product Association. • Product Criteria. • Security Membership. • Featured Products.
DIAG_RULEROLE_SETUP	Displays information about Role and Rules Setup through input prompt of Operator ID: • Role. • Role and Rules.
DIAG_SALESTERRITORY	Displays information about Sales Territory Info through input prompt of user id: • TREE MANAGER. • TREE MANAGER NODES. • TREE Details. • Territory Details.
DIAG_SALESUSER	Displays information about Sales User details through input prompt of user ID: • SALES USER DETAILS. • SALES USER VISIBILITY DETAILS. • SALES ACCESS PROFILE DETAILS.

Note: Before you can run any of these diagnostic packages, you must register them.

See Register Diagnostics Page.

Registering PeopleSoft CRM Diagnostics

This topic discusses how to run PeopleSoft CRM diagnostics.

Page Used to Register PeopleSoft CRM Diagnostics

Page Name	Definition Name	Usage
Register Diagnostics Page	PT_DIAG_FRAME_REG	Register diagnostic packages to run in the PeopleSoft CRM system.

Register Diagnostics Page

Use the Register Diagnostics page (PT_DIAG_FRAME_REG) to register diagnostic packages to run in the PeopleSoft CRM system.

Navigation:

Application Diagnostics > **Register Diagnostics** > **Register Diagnostics**

This example illustrates the fields and controls on the Register Diagnostics page.
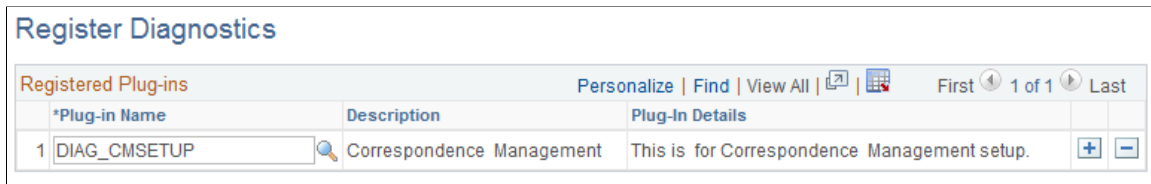
Field or Control	Description
🔍	Click the **Look Up Plug In Name** button and search for a package name that begins with DIAG.

Related Links
"Understanding Application Classes and Packages" (Automation and Configuration Tools)

Running PeopleSoft CRM Diagnostic Packages

This topic describes how to run PeopleSoft CRM diagnostic packages.

Pages Used to Run PeopleSoft CRM Diagnostic Packages

Page Name	Definition Name	Usage
Launch Diagnostics Page	PT_DIAG_PLUGIN	Select and run diagnostic packages.
PeopleSoft Diagnostics Page	PT_DIAG_PLUGIN	View the diagnostics for the selected plug-ins.

Launch Diagnostics Page

Use the Launch Diagnostics page (PT_DIAG_PLUGIN) to select and run diagnostic packages.

Navigation:

Application Diagnostics > Launch Diagnostics > Launch Diagnostics

This example illustrates the fields and controls on the Launch Diagnostics page.
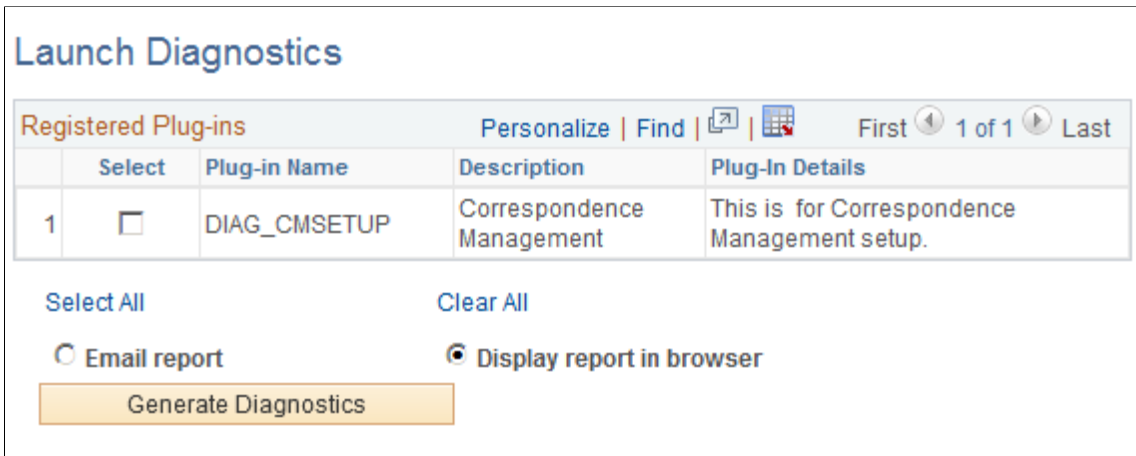
Select one or more diagnostic packages to run and click the Generate Diagnostics button.

Field or Control	Description
Email report	Select to have the report emailed to you

Field or Control	Description
Display report in browser	Select to have the report appear in a separate popup window.

PeopleSoft Diagnostics Page

Use the PeopleSoft Diagnostics page (PT_DIAG_PLUGIN) to view the diagnostics for the selected plug-ins.

Navigation:

Select one or more listed plug-ins on the Launch Diagnostics page. Select the **Display report in browser** option and click the **Generate Diagnostics** button.

This example illustrates the fields and controls on the PeopleSoft Diagnostics page 1 of 2.

PeopleSoft Diagnostics

Database Name: **CRM92**
User ID: **PS**
Date Created: **2014-04-30-05.42.23.000000**
Database Type: **ORACLE**
PeopleTools Version: **PeopleTools 8.53.07.000**
Application Release: **CRM 9.20.00.302**

Plug-in Name: DIAG_CMSETUP
Description: Correspondence Management

Purpose: Correspondence Management Diagnostics

The following values were retrieved:
****Merger Server Printer**** ****PS_RBC_PRINTER_LST****
****Install Options for CM**** ****PS_RBC_CM_SYSDEFN****
RB_PDF_OPTIONS 3
RB_URL_ID1 RB_CORRMGT
RB_URL_ID2 RB_CORRMGT
RB_URL_ID3 RB_CORRMGT
RB_URL_ID4 RB_CORRMGT
RB_URL_ID5 RB_CORRMGT
EMAIL_ADDR_SENDER support@rt.peoplesoft.com
****FTP URL Detail**** ****PS_RBC_CM_SYSDEFN****
URL_ID RB_CORRMGT
URL ftp://ftpuser:Hello123@slc02klx/crm
****Process Scheduler Server for CM Jobs**** ****PS_PRCSJOBDEFN****

This example illustrates the fields and controls on the PeopleSoft Diagnostics page 2 of 2.

```
PRCSJOBNAME DELVUNIX
SERVERNAME <blank>
PRCSJOBNAME DELV_NT
SERVERNAME MERGE_NT
PRCSJOBNAME EXTRDATA
SERVERNAME <blank>
PRCSJOBNAME MERGEDOC
SERVERNAME MERGE_NT
****Process Scheduler Server Details**** ****PS_PMN_SRVRLIST****
SERVERNAME PSNT
DESCR2 Windows
SERVERSTATUS 3
SRVRHOSTNAME SLC02KYM
LASTUPDDTTM 2014-04-25-19.20.19.220000
```

OK

Setting Up and Maintaining Provider Groups and Group Members

Understanding Provider Groups and Group Members

Provider groups organize groups of workers that provide the services or support that are offered by an organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group. For cases, you can assign cases directly to provider group members (agents) rather than going through a provider group assignment.

You can create provider groups that represent workers who service or support specific geographic regions, specific products, or specific customers. Provider groups might also represent workers who have specific competencies. Each worker that can be assigned to a service order must belong to at least one active provider group.

Provider Group Data Model

The following diagram illustrates that a provider group definition includes group cost information, group members, an operating schedule, assignment criteria, and competency information:

This diagram illustrates that a provider group definition includes group cost information, group members, an operating schedule, assignment criteria, and competency information.
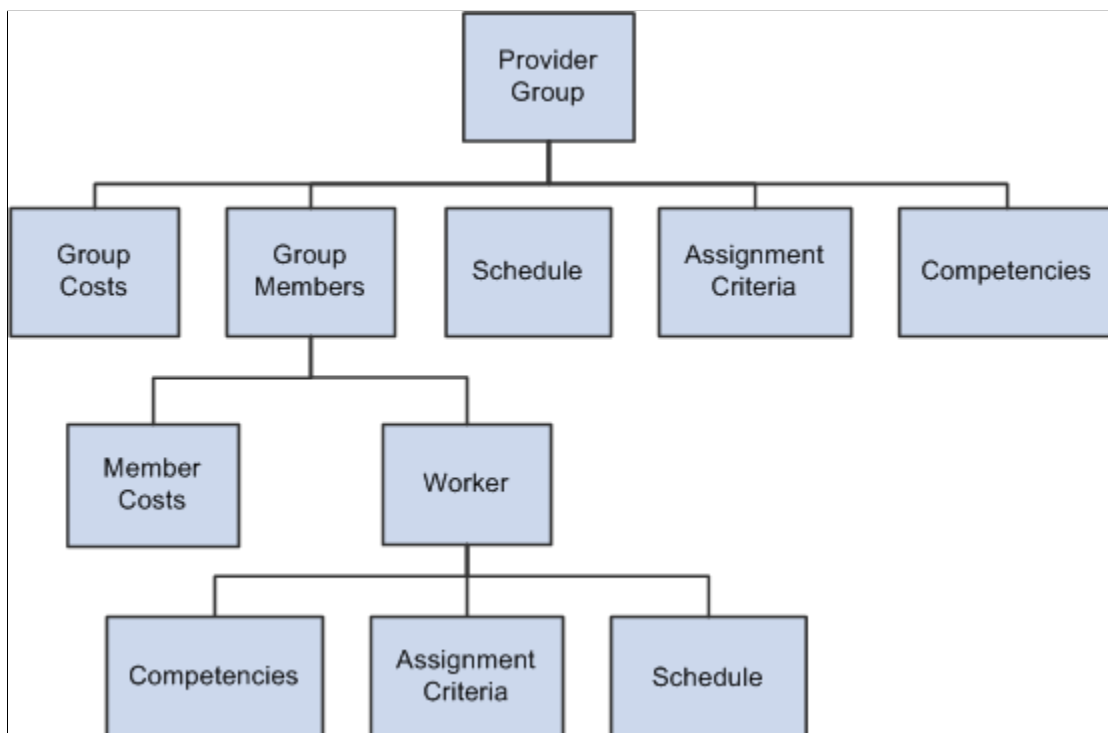
Each group member can represent employees or third-party contractors. You can also define cost information for each worker in the group. Workers are defined using the Worker component.

Default Assignments for Service Orders

Default assignments for provider groups and group members can be automatically populated for service orders based on the related agreement or service. The defaults for an agreement take precedence over the defaults for a service. For on-demand service orders, the default provider group and group member information come from the service definition.

System-Suggested Assignments for Cases and Service Orders

For both provider groups and workers, you can define competencies and assignment criteria for provider group and group member assignment searches that are performed on a case or service order. The system uses the competency and assignment criteria to evaluate the best candidate for assignment to the case or service order.

To further inform assignment decisions, the system displays current availability status of each provider group or group member on the candidate list. To determine availability for a provider group, the system uses the schedule information—the hours of operations and holidays—that you define for the provider group.

For group members, the system determines availability by using schedule information that is defined on the worker's resource calendar, if it's available, or standard workweek information that is defined for the installation. In addition to availability status, the system also displays the current number of open cases that are assigned to each worker in the list when the assignment search is performed for a case.

Automatic Assignments for Cases

PeopleSoft Customer Relationship Management (PeopleSoft CRM) performs automatic assignment for regular and self-service cases based on the configuration rules that are set up at the call center business unit level. For each type of case (regular and self-service), you can configure separate assignment options for provider groups and group members (agents).

Regardless of the configuration, an existing provider group or group member assignment is never overwritten. For example, if you select a provider group for the case through the system-suggested assignment, the system does not attempt to assign a provider group when you save.

See "Understanding Call Center Business Units" (PeopleSoft Call Center Applications).

Automatic Assignments for Service Orders

Similar to cases, you can enable PeopleSoft CRM to assign service orders automatically at save time by activating the automatic assignment feature at the field service business unit level.

The automatic assignment feature, however, does not overwrite any provider group or group member values that are present on service orders as a result of manual, default, or system-suggested assignment.

If the **Candidate must be available** check box is selected at the business unit level, the assignment engine only considers provider groups and group members that are available (during the time the service is performed) for the automatic assignment. No automatic assignment will be made if this check box is selected and there is no provider group or technician available.

See "Setting Up Automatic Service Order Assignments" (PeopleSoft Integrated FieldService).

Related Links

"Understanding Workers in CRM" (Business Object Management)

Understanding Assignment Searches

Understanding Agreements and Warranties

"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)

"Understanding Call Center Business Units" (PeopleSoft Call Center Applications)

Establishing Cost Categories for Workers

To define cost categories, use the Cost Categories (RF_COST_CAT_GBL) component. This topic discusses how to define cost categories for workers.

Page Used to Define Cost Categories

Page Name	Definition Name	Usage
Cost Categories Page	RF_COST_CAT	Define cost categories to account for the cost of labor time to your company.

Cost Categories Page

Use the Cost Categories page (RF_COST_CAT) to define cost categories to account for the cost of labor time to your company.

Navigation:

Set Up CRM > **Common Definitions** > **Employee Data** > **Cost Categories** > **Cost Categories**

This example illustrates the fields and controls on the Cost Categories page.

Once you define cost categories, establish an hourly cost rate for each category that provider groups use on the Provider Groups page. Specify cost categories and rates for group members on the Provider Group Member page.

Field or Control	Description
Cost Category Code	Enter cost categories to account for the labor costs that the organization incurs; that is, the cost to provide a worker to perform a service for your customers.
VAT Defaults (value-added tax defaults)	Click to go to the VAT Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database. Use the page to specify a value for all the required fields, for any fields that require an overall default at the top of the VAT default hierarchy, or for any fields that require an exception to the value specified for a VAT driver higher up in the VAT default hierarchy. You can insert rows for any or all of the VAT driver keys, as well as the VAT country or state. You can also delete existing rows
Service VAT Treatment Defaults	Click to access the Service VAT Treatment Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database. Use this page to enter VAT defaulting information for service VAT treatment.

Note: VAT is an acronym for value-added tax. Under many different names, VAT is in use in over 130 countries around the world. VAT is a governmental sales tax, a straight percentage that is added to the cost of a good or service. VAT can be inclusive (included in the price of a good or service), or exclusive (added to the price of a good or service).
The VAT-related links on this page appear if the Field Service option to send billing information to Contracts has been selected as part of the installation options.

See Also

PeopleSoft FSCM: Global Options and Reports, "Working with VAT"

Defining Provider Groups

To define provider groups, use the Provider Group (PF_PROVIDER _GRP) and Provider Group Member (RF_GRP_MEMBER) components. To load data into these tables for these components, you can also use the RF_PROVIDER _GRP_SCI and RF_GRP_MEMBER_CI component interfaces.

This topic lists prerequisites and common elements for defining provider groups.

Pages Used to Define Provider Groups

Page Name	Definition Name	Usage
Provider Groups Page	RF_PROVIDER_GRP	Define and maintain the groups of people who perform service or support activities.
Provider Group Member Page	RF_GRP_MEMBER	Define the people who are associated with a provider group.

Prerequisites

Before you define provider groups, you must:

- Define workers by using the Worker component.

- (Optional) Define cost categories.

Related Links
"Understanding Workers in CRM" (Business Object Management)
Establishing Cost Categories for Workers

Common Elements Used in Defining Provider Groups

Field or Control	Description
Hourly Rate and **Currency Code**	Enter the cost to your company for one hour of labor time that is charged to this cost category, and the currency that you use for the cost.
Multiplier	Enter a numeric value to generate an hourly billing rate that is based on the hourly rate.
Billable Rate	Displays the value that is calculated at save time or the next server trip that reflects the hourly billing rate, which is based on the following formula: (Billable Rate) = (Hourly Rate) * (Multiplier)

Provider Groups Page

Use the Provider Groups page (RF_PROVIDER_GRP) to define and maintain the groups of people who perform service or support activities.

Navigation:

Workforce > **Provider Groups** > **Provider Groups**

This example illustrates the fields and controls on the Provider Groups page (1 of 2).

This example illustrates the fields and controls on the Provider Groups page (2 of 2).

Basic Information

Field or Control	Description
Status	Select the current status of the provider group: *Active* or *Inactive*. The system excludes all inactive provider groups from system prompt lists; therefore, you can't assign them to service orders and cases. Also, you can't change the status of a provider group to *Inactive* if any of its group members is currently assigned to an open service order or case. **Note:** When you change the status of a provider group to *Inactive,* the status of all its members changes to inactive automatically and can't be modified unless you set the provider group status to *Active* again. To activate group members, you must manually change the status of each group member to *Active.* If you change the status of a group member to *Inactive* by using the Worker component, the group member automatically becomes inactive in the associated provider group.
Type	For informational purposes, the **Type** defines whether members of the provider group are internal employees or third-party maintainer (TPM) employees, or both.
Manager Name	Enter the user who manages the provider group. The system uses this value to filter cases for display on the Manager Dashboard. When a user accesses the Manager Dashboard to view case backlogs as well as cases that are at risk of exceeding SLAs, the system first identifies the manager that is selected in respective personalization pages of these dashboard pagelets for this user. With this information, it displays case information pertaining to provider groups that are managed by the selected manager.
Company Name	Select the company that is associated with the provider group. When a provider group represents staff from a third-party contractor, use this field to define a name for the third-party company. Click the **Transfer to Company** button to access the Company component and define an additional company.

Field or Control	Description
Notifications	The system uses the notification routing preferences that are associated with the group member's user ID to publish workflow notifications about service order assignment changes that affect the group member. Routing preferences are defined for the group member's user profile on the Workflow page of the User Profiles component under **PeopleTools** > **Security.**
Use Members to Broadcast	Select to send all automated notifications (that are sent to the group) to each member's individual worklist instead of to the group worklist. The system never broadcasts manual notifications, regardless of whether this check box is selected.
Group Worklist and **Group Worklist Name**	Select the check box and the name of the group worklist that is associated with the provider group. Worklists are established on the Group Worklist page. As group membership changes, update permissions for the group worklist as necessary.
Preferred Notification	Select the preferred way of receiving notification: *Email, Worklist,* or *Both.*
Email Address	Enter the email address that is used to send notifications to the provider group.
Currency Code	Select the currency that is used to determine labor costs for the work that provider group members perform. The selected currency becomes the default for new rows in the **Group Cost Categories** grid. Currency codes are established on the Currency Code page.

Group Cost Categories

The **Group Cost Categories** grid reflects the costs per hour and corresponding billable rates for the members of the provider group.

Field or Control	Description
Cost Category	Select the code of the cost category that is used to account for the labor time of members in the provider group. Cost category codes are defined on the Cost Categories page.

Field or Control	Description
Hourly Rate, Currency Code, Multiplier, and Billable rate	Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the group of members. When you save the page, the system multiplies the hourly rate by the value in the **Multiplier** field to calculate the billable rate.

See "Cost Categories Page" (Business Object Management).

Group Members

Field or Control	Description
	Click the **Details** button to access the Provider Group Member page, where you can view or modify the group member record.
Name	Displays the name (first name followed by last name) of the group member. Before you can add a new person to the group, the person must be defined using the pages in the Worker component. Click the **Transfer to Worker** button that is next to this field to access the Worker component. **Note:** You can also define members of the provider group on the Provider Group Member page.
Status	Select the person's current status as a member of this provider group: *Active* or *Inactive*. The system excludes all inactive group members from system prompt lists, so you can't assign them to service orders and cases. You cannot change the status of a group member to *Inactive* if an open service order is assigned to the group member. Similarly, you cannot delete a group member if an open service order is assigned to him or her.

Related Links
"Understanding Workers in CRM" (Business Object Management)

Understanding Notes and Attachments

"Understanding Services Operational Dashboards" (PeopleSoft Call Center Applications)

Provider Group Member Page

Use the Provider Group Member page (RF_GRP_MEMBER) to define the people who are associated with a provider group.

Navigation:

• **Workforce** > **Provider Group Members** > **Provider Group Member**

• Click the **Details** button on the Provider Groups page.

This example illustrates the fields and controls on the Provider Group Member page (1 of 2).

This example illustrates the fields and controls on the Provider Group Member page (2 of 2).

To view details about the selected provider group, click the **Transfer to Provider Group** button that is next to the provider group ID to access the Provider Group page.

Member Information

Field or Control	Description
Name	Displays the name of the group member that you enter when adding the record. **Note:** You can also define members of the provider group on the Provider Group page.

Field or Control	Description
Currency Code	Select the currency that you use to determine the labor costs for the work that the group member provides. The selected currency becomes the default for new rows in the **Member Cost Categories** group box. Currency codes are established on the Currency Code page.

Member Cost Categories

The **Member Cost Categories** group box reflects the costs per hour and corresponding billable rates for the member.

Field or Control	Description
Cost Category	Select the code of the cost category that you use to account for the labor time of the group member. Define cost category codes on the Cost Categories page.
Hourly Rate, Currency Code, Multiplier, and Billable rate	Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the member. When you save the page, the system multiplies the hourly rate by the value in the **Multiplier** field to calculate the billable rate.

Assigned Service Orders

Use this section to view service order assignments for the group member. The system displays this grid only if the user has at least one assigned service order. Similarly for cases, the system displays the Assigned Cases grid only if the user has one or more assigned cases.

Field or Control	Description
Unit	Displays the PeopleSoft Integrated FieldService business unit where the service order originated.
Service Order	Displays the number of the service order that is assigned to the group member. Click the **Transfer to Service Order** button to access that service order.

Assigned Cases

Use this section to view case assignments for the group member.

Field or Control	Description
Unit	Displays the PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources. business unit where the case originated.
Case ID	Displays the number of the case that is assigned to the group member. Click the **Transfer to Case** button to access that case.

See *PeopleTools: Security Administration* product documentation.

Related Links

"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)

Defining Schedules for Provider Groups

Schedule information determines when the provider group is available for assignment.

Page Used to Define Schedules for Provider Groups

Page Name	Definition Name	Usage
Schedule Page	RF_PROVGRP_TIME	Define the hours of operation for a specific provider group.

Schedule Page

Use the Schedule page (RF_PROVGRP_TIME) to define the hours of operation for a specific provider group.

Navigation:

Workforce > **Provider Groups** > **Schedule**

This example illustrates the fields and controls on the Schedule page.

To define hours of operation for a provider group:

1. Specify the appropriate time zone.

    The time periods that you define in **Hours of Operation** group box appear in the time zone that you select.

2. Specify the appropriate holiday schedule, if applicable.

    If the date that an assignment search is performed corresponds to a holiday for a provider group, the system indicates that the provider group is unavailable for assignment. Define holiday schedules by using the Holiday Schedule page under **Set Up CRM** > **Common Definitions** > **Calendars and Schedules.**

    Note: You can update workers' calendars with specified holiday schedules by running the Load Holiday process (RF_HOLIDAY).
    ---

3. Select the days of the week that the provider group is open for business transactions.

    If the date that an assignment search is performed corresponds to a day that a provider group is not open for business transactions, the system indicates that the provider group is unavailable for assignment.

4. For each day of the week, specify the hours of operation.

    Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. Establish default values for this page on the Installation - Calendar Options page under **Set Up CRM** > **Install** > **Installation Options.**

Related Links
Understanding Assignment Searches
Associating Workers with Holiday Schedules

Defining Group Assignment Criteria and Competencies

This topic discusses how to define group assignment criteria and competencies.

Pages Used to Define Group Assignment Criteria and Competencies

Page Name	Definition Name	Usage
Assign Group Criteria Page	RF_PRV_GRP_CRIT	Define the criteria that you use to match a provider group to a case or service order.
Group Competencies Page	RF_PRVGRP_COMP	Associate a provider group with a list of competencies and define the provider group's level of proficiency for each competency.

Assign Group Criteria Page

Use the Assign Group Criteria page (RF_PRV_GRP_CRIT) to define the criteria that you use to match a provider group to a case or service order.

Navigation:

Workforce > **Provider Groups** > **Assign Group Criteria**

This example illustrates the fields and controls on the Assign Group Criteria page (1 of 2).

Provider Groups	Schedule	**Assign Group Criteria**	Group Competencies

SetID CRM01   **Provider Group ID** APLE

Region   Personalize | Find | ⬚ | ⬚

Region Description

Eastern	🔍	➕ ➖

Customer   Personalize | Find | ⬚ | ⬚

*SetID	*Customer		Site		
CRM01 🔍	MMA Property Management Group	🔍		🔍	➕ ➖

Product   Personalize | Find | ⬚ | ⬚

*SetID	Product Description	*Proficiency		
CRM01 🔍	26.7 cu. Ft. Refrigerator w/Fc 🔍	4-Very Good ▼	➕ ➖
CRM01 🔍	21.6 cu. Ft. Top Refrigerator 🔍	4-Very Good ▼	➕ ➖
CRM01 🔍	24.7 cu. Ft. Refrigerator w/Fc 🔍	4-Very Good ▼	➕ ➖
CRM01 🔍	19.6 cu. Ft. Top Refrigerator 🔍	4-Very Good ▼	➕ ➖
CRM01 🔍	14.8 cu. Ft. Chest Freezer Fla 🔍	5-Expert ▼	➕ ➖
CRM01 🔍	7.2 cu. Ft. Chest Freezer Flas 🔍	5-Expert ▼	➕ ➖
CRM01 🔍	22.8 cu. Ft. Chest Freezer Man 🔍	5-Expert ▼	➕ ➖
CRM01 🔍	17.8 cu. Ft. Chest Freezer Man 🔍	5-Expert ▼	➕ ➖

This example illustrates the fields and controls on the Assign Group Criteria page (2 of 2).

When an assignment search is performed from a case or service order, the assignment engine calculates a point value for each criteria value on the service order or case that the provider group matches, based on the weight, or relative importance of the match. The sum of the point values becomes the provider group's fit score. Failure to match a criterion does not exclude the provider group from the list of suggested assignment candidates, but it lowers the provider group's total fit score.

For help desk cases, the assignment engine matches values for department, location, product, and product group. For service orders and support cases, the assignment engine matches values for customer, site, region, product, and product group. For Service Center for Higher Education cases, the assignment engine can match values on a combination of these parameters.

Enter each region, customer, product, product group, location, department, and role that the provider group supports.

Region

Region information can be derived from information that is on the service order or case. At least one region is required.

Customer

If the provider group can support a customer at any site, enter the customer and leave the **Site** field blank. You can also select a site without specifying a customer.

Product

Enter the setID and the name of the product and the group's proficiency level for supporting the product. Available values for the **Proficiency** field depend on the product rating model that you specify for the setID on the Assignment Setup page of the Assignment Engine Setup component under **Set Up CRM** > **Common Definitions** > **Codes and Auto Numbering** > **Assignment Weighting Factors.**

Product Group

Enter the product group that the provider group supports.

Person Type

Select the person type that the provider group supports. IT and HR Help Desk use the person type of the person on the case to assign provider groups and agents to cases based on the person's relationship to the organization. The available person types are *Contingent Worker*, *Employee*, and *Person of Interest*; . When assigning HR Help Desk cases, the Person of Interest person type is not considered.

Location

Enter the location that the provider group supports.

Department

Enter the department that the provider group supports.

Security Role

Enter the role that the provider group supports.

Note: Change management is the only product that uses role criteria for assignments.

Related Links

Understanding Assignment Searches
"Understanding Products in PeopleSoft CRM" (PeopleSoft Product and Item Management)

Group Competencies Page

Use the Group Competencies page (RF_PRVGRP_COMP) to associate a provider group with a list of competencies and define the provider group's level of proficiency for each competency.

Navigation:

Workforce > **Provider Groups** > **Group Competencies**

This example illustrates the fields and controls on the Group Competencies page.
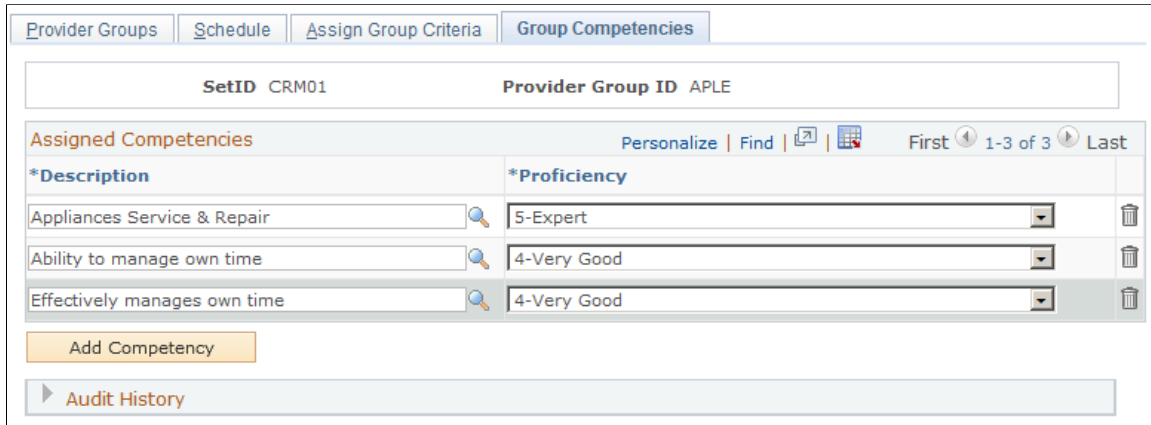
PeopleSoft Integrated FieldService can evaluate which provider group is best qualified for assignment to a service order by comparing provider group competency and proficiency with the competency and proficiency that is required for a service or service activity on a service order.

Similarly, in PeopleSoft Support and PeopleSoft HelpDesk, the system can evaluate which provider group is qualified for assignment to a case by matching the competency and proficiency that you specify on the case in the **Problem Type** field with the competency that is defined for the provider group.

Assigned Competencies

Field or Control	Description
Description	Select a competency. Establish competencies on the Competencies page of the Competencies component under **Set Up CRM** > **Common Definitions** > **Competencies.**
Proficiency	Select the provider group's level of expertise for the competency. The rating model that you define for the competency on the Competencies page determines the available proficiency values. In PeopleSoft Integrated FieldService, PeopleSoft Support and PeopleSoft HelpDesk, the system checks a provider group's proficiency level to determine whether the provider group is qualified to perform work on a service order or case that requires the competency.

Related Links

Understanding Assignment Searches

"Understanding Workers in CRM" (Business Object Management)

"Understanding Products in PeopleSoft CRM" (PeopleSoft Product and Item Management)

Defining Hierarchy for Provider Groups

Provider group hierarchy facilitates the members in parent provider group to view and access secured cases of child provider groups.

Pages Used to Define Hierarchy for Provider Groups

Page Name	Definition Name	Usage
Group Hierarchy Page	RF_PV_GROUP_HIRCHY	Define parent child hierarchy for a specific provider group.

Group Hierarchy Page

Use the Group Hierarchy page (RF_PV_GROUP_HIRCHY) to define parent child hierarchy for a specific provider group.

There can be multiple parents for a child. Also, there can be many child provider groups for a parent thereby establishing "Many to Many" relationship. One Provider Group can't be configured as the child and parent for the same time period.

Note: The provider group hierarchy is applicable only for secured cases.

Provider group hierarchy can be defined by means of Group Hierarchy page or inserting data using SQL.

To enable provider group hierarchy feature, perform the following:

* Activate the Service Operation RC_PG_LOAD_CHILD

* Run Group Hierarchy Report process (Workforce, Group Hierarchy Report). The Group Hierarchy Report process should be run each time the service operation RC_PG_LOAD_CHILD status is altered.

Navigation:

Workforce, Provider Groups, Group Hierarchy

This example illustrates the fields and controls on the Group Hierarchy page.

Field or Control	Description
SetID	SetID of the provider group.
Provider Group ID	Unique ID of the provider group.
View	Enables to search historical, current, future, or the entire parent child relationship entries. This will be assessed based on current date. By default, "All" is displayed in this field.

Parent Provider Group

Field or Control	Description
Provider Group Name	Name of the parent provider group.
Start Date	Date from which the provider group is assigned as the parent in the hierarchy.
End Date	Date up to which the provider group member is assigned as the parent in the hierarchy.

Child Provider Group

Field or Control	Description
Provider Group Name	Name of the child provider group.
Start Date	Date from which the provider group is assigned as the child in the hierarchy.
End Date	Date up to which the provider group member is assigned as the child in the hierarchy.

Defining Hierarchy through Database Insertion.

To define group hierarchy using SQL, perfom the following:

1. Insert required data in the following fields of RF_GROUP_HIRCHY table.

   SETID

   PROVIDER_GRP_ID (Child)

   RF_GROUP_HIER_ID (Parent)

   START_DATE

   END_DATE

2. Run Group Hierarchy Report process. (Navigation: Workforce, Group Hierarchy Report)

   Note: The Group Hierarchy Report process should be run each time the service operation **RC_PG_LOAD_CHILD** status is altered.

Chapter 13

Managing Workforce Competencies

Understanding Competencies in PeopleSoft CRM

This topic discusses:

- Competencies.

- Competency integrations.

Related Links
Understanding Assignment Searches
"Understanding Products in PeopleSoft CRM" (PeopleSoft Product and Item Management)
"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)
Setting Up PeopleSoft CRM Application Installation Options

Competencies

In PeopleSoft CRM, competencies define the skills of the workforce. You can associate a set of competencies with provider groups and workers and define the competency proficiency level for each provider group and worker.

In PeopleSoft Integrated FieldService, define competency requirements for the services that the company provides, and the minimum level of competency proficiency that is required to perform a service or service activity.

Similarly, in PeopleSoft call center applications, you set up minimum competency proficiency requirements for the problem type, category, type or detail information that are used for case assignment. By comparing the competency requirements with the competencies that you define for your workforce, the system can generate a list of qualified candidates to assign to a case.

You can enter competencies and competency proficiency ratings by using components within PeopleSoft CRM or by integration with PeopleSoft Human Capital Management (PeopleSoft HCM) or a third-party human resource management system.

Competency Integrations

These are the enterprise integration points (EIPs) that update CRM competencies with HCM competencies.

Person Competency

This EIP synchronizes system tables with competency information that you define in an HR system. The Person Competency EIP includes two application messages: PERSON_COMPETENCY_FULLSYNC and PERSON_COMPETENCY_SYNC.

At initial implementation, the HCM publishes a full set of competency records to PeopleSoft CRM by using the PERSON_COMPETENCY_FULLSYNC application message. When a user adds or modifies competency definitions in the HR system after the initial full synchronization, each change is published to PeopleSoft CRM by using the PERSON_COMPETENCY_SYNC application message.

Warning! A FULLSYNC overwrites any changes that you made to competency information in CRM.

Rating Model

The RATING_MODEL_FULLSYNC and RATING_MODEL_SYNC messages are used to initially load rating models from an HR system and to update competency rating models, respectively.

Competency

The COMPETENCY_SYNC and COMPETENCY_FULLSYNC messages are used to initially load rating models from an HR system and to update competency rating models, respectively.

Flow of Integration

PeopleSoft CRM is a subscriber to competency EIP messages, not a publisher. Any changes that you make to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with the HCM system.

Make all updates to competency records in your HCM system and publish them to PeopleSoft CRM, as the following diagram illustrates:

This example illustrates the fields and controls on the Flow of competency information from HCM to CRM.
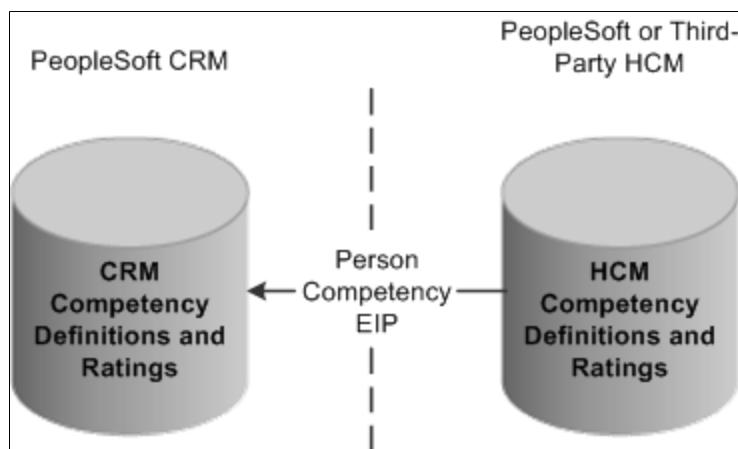
Related Links

"Understanding Enterprise Integration Technology" (Business Object Management)

Setting Up Competency Information in PeopleSoft CRM

To define competency information, use the Review Rating (CM_REVW_RATING), Competency Type (CM_TYPE_TABLE), and Competency (COMPETENCY_TBL) components.

If you do not synchronize competency information with another system by using the Person Competency EIP, you can manually define competency rating models, competencies, and the competency proficiency for workers by using components in PeopleSoft CRM.

This topic discusses how to set up competency information in PeopleSoft CRM.

Pages Used to Set Up Competency Information in PeopleSoft CRM

Page Name	Definition Name	Usage
Competency Rating Model Page	CM_REVW_RATING_TBL	Define codes that you want to use to indicate a provider group or worker's level of proficiency for a competency that is required to perform a service or support a product.
Competency Types Page	CM_TYPE_TABLE	Define competency types, broad categories of competencies that are relevant to particular positions or projects. When you define a competency, it can be associated with one or more types.
Competencies Page	COMPETENCY_TABLE	Establish IDs for competencies and then tie the ID to the rating model and competency types.

Competency Rating Model Page

Use the Competency Rating Model page (CM_REVW_RATING_TBL) to define codes that you want to use to indicate a provider group or worker's level of proficiency for a competency that is required to perform a service or support a product.

Navigation:

Set Up CRM > **Common Definitions** > **Competencies** > **Competency Rating Model** > **Competency Rating Model**

This example illustrates the fields and controls on the Competency Rating Model page.

A rating model specifies how you measure a provider group or worker's proficiency for a particular competency.

Rating Levels

Field or Control	Description
Rating	Enter a code that represents the rating level. When defining a rating, you must enter a code by using one alphanumeric character.
Description	Enter a description of the rating code by using up to 30 alphanumeric characters. **Note:** Include the numeric number of the rating at the beginning of the rating level description. This enables the system to display the rating descriptions in numerical order instead of alphabetical order on the prompts where users select ratings levels.

Field or Control	Description
Rating Points	Enter a numeric value that the assignment engine uses to represent the relative importance of each rating. **Important!** When defining rating point scales for rating models that are used to rate the proficiency of a provider group or worker, use a numeric rating system in which the highest number of points represents the highest level of proficiency. Otherwise, the fit score values that the assignment engine calculates will not accurately reflect the best qualified candidate. The minimum proficiency, however, is tied to a service, not within the rating model.

Related Links
Understanding Assignment Searches

Competency Types Page

Use the Competency Types page (CM_TYPE_TABLE) to define competency types, broad categories of competencies that are relevant to particular positions or projects.

When you define a competency, it can be associated with one or more types.

Navigation:

Set Up CRM > **Common Definitions** > **Competencies** > **Competency Types** > **Competency Types**

This example illustrates the fields and controls on the Competency Types page.
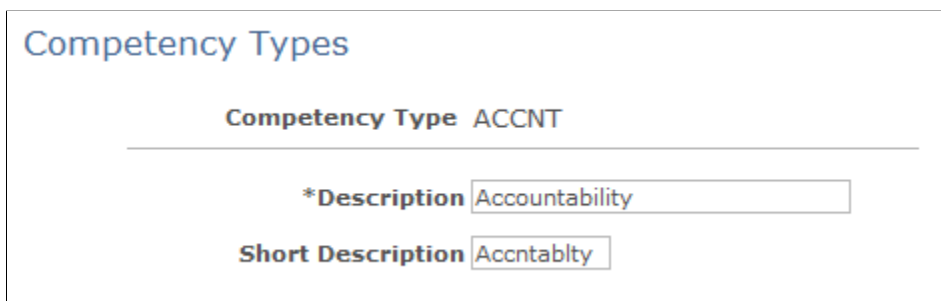
Although competency types are not used by the system, you can develop reports that reflect competency categories.

Competencies Page

Use the Competencies page (COMPETENCY_TABLE) to establish IDs for competencies and then tie the ID to the rating model and competency types.

Navigation:

Set Up CRM > **Common Definitions** > **Competencies** > **Competencies** > **Competencies**

This example illustrates the fields and controls on the Competencies page.

Competencies can represent any provider group or worker skills, abilities, knowledge, product support areas, or behaviors that are pertinent to jobs in the organization, such as the ability to repair and maintain specific products or equipment, knowledge of specialized manufacturing processes, or expertise with computer programming languages. The codes can be broad or detailed and can represent any type of competency.

To enable system-suggested assignments on service orders, define each skill that is required to complete work on a service order as a competency in your system. To enable system-suggested assignments on cases that are based on the problem type, category, type or detail that the user specifies, define competencies that correspond to this information.

Field or Control	Description
Description	Enter a description that uses up to 30 alphanumeric characters. **Note:** These descriptions should make sense to a user that is viewing a list of problem types. For example, competencies like *Works independently* or *Microsoft Certification* are probably not appropriate descriptions for problem-type competencies. If the product is a laptop, appropriate problem type competencies may include *hard drive* and *network connectivity.*
Rating Model	Select the model that is used to evaluate a provider group or worker's degree of expertise for this competency. Establish rating models on the Competency Rating Model page.
Type	Select competency types for this competency, if applicable. Establish competency types on the Competency Types page.

Defining Competency Proficiency Levels

You establish competency proficiency for provider groups on the Group Competencies page of the Provider Groups component. Similarly, you establish competency proficiency for workers on the Competencies page of the Worker component.

The system uses the level of competency proficiency that you define for provider groups and workers to evaluate whether the provider group or worker is qualified to perform work on a service order or provide support on a case. You can also track the competency proficiency of your workforce for informational purposes.

Related Links

"Understanding Workers in CRM" (Business Object Management)
Understanding Provider Groups and Group Members

Defining Minimum Competency Requirements for Service Orders or Cases

In PeopleSoft Integrated FieldService, the system evaluates which workers are qualified to perform work on a service order by matching the minimum level of competencies that you define for the associated service or service activity with workers' proficiency for the corresponding competencies.

In PeopleSoft call center applications, you establish minimum competency proficiency requirements for the problem type, category, type or detail information on cases, which the system uses when performing call center agent assignment.

Related Links

"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)
"Understanding Call Center Prompt Tables" (PeopleSoft Call Center Applications)

Chapter 14

Setting Up and Performing Assignment Searches

Understanding Assignment Searches

This topic discusses:

- Fit scores.

- Activity.

- Assignment criteria.

- Candidate selection and fit score generation.

Fit Scores

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can perform assignment searches to find the provider groups and group members that are best suited to a case or service order. The system returns a list of eligible candidates ranked by *fit score*, which is an evaluation of how well each provider group or group member matched criteria on the case or service order.

In addition to fit score, the system displays current availability and, for group member assignment searches that are performed for a case, the number of open cases that are currently assigned to the group member.

The system doesn't restrict the workforce assignment only to what it suggests. You can select the provider group and group member that the system recommends, any provider group and group member on the list (regardless of the fit score, current availability, or case load), or any provider group and group member that does not appear on the list, to be assigned to a case or service order.

Note: If you use auto-assignment to assign a provider group member to a case and multiple members tie for the highest fit score, the system assigns the member with the lowest case load. If two or more members tie for highest fit score and lowest case load, the system selects the first person in the list. In this situation the system makes an arbitrary assignment based on the member with the lowest person ID.

Activity

The system displays the activity from the service order.

Because a competency may be required for more than one activity, this column indicates the activity to which the competency applies. This column does not appear when you perform the assignment search from a case.

Assignment Criteria

PeopleSoft CRM uses the assignment engine to generate recommendations for provider group and group member assignments. The assignment engine uses this information in the assignment evaluation process:

- General assignment criteria.

- Case-specific assignment criteria.

- Service order-specific assignment criteria.

- Weighting factors.

- Assignment search data model.

General Assignment Criteria

For each worker or provider group, you can define a list of values that the worker or provider group specializes or supports under these criteria: customer, location, product, product group, region, site, department, person type, security role.

When you perform an assignment search on a service order or case, the assignment engine matches the values of these criteria that are available on the service order or case to the values that are available on workers and provider groups. The weight, or relative importance, of each assignment criteria match determines a candidate's fit score.

Failure to match an assignment criteria value on a case or service order lowers the fit score but does not exclude a provider group or group member from the list of eligible candidates. However, if you do not select the **Display Provider Groups and Group Members with no Criteria Matches** check box on the Assignment Setup page, then a provider group or group member must match at least one criteria or competency value to be included in the list.

The assignment engine uses a different set of assignment criteria values when searching for a case in PeopleSoft HelpDesk or Support, or for a service order in PeopleSoft Integrated FieldService.

The table below illustrates:

- For help desk cases, the assignment engine matches values for department, location, product, product group, person type, problem type, and category, type, and detail (CTD) competencies.

- For help desk change requests, the assignment engine matches values for department, location, product, product group and security role. Help desk change requests are matched only against provider groups.

- For support cases, the assignment engine matches values for customer, site, region, product, product group, problem type, and CTD competencies.

- For service orders, the assignment engine matches values for customer, site, region, product group, product, service (or service activity) competency.

- For Service Center for Higher Education cases, the assignment engine matches values according to either help desk or support case criteria, based on the caller for the case. If the caller is a worker, help desk criteria is used: if the caller is a company contact or consumer (constituent), support criteria is used.

Assignment Criteria	Used in Support Case?	Used in Help Desk Case?	Used in Help Desk Change Request?	Used in Service Order?
Competency - CTD	Yes	Yes	Yes	NA
Competency - Problem Type	Yes	Yes	Yes	NA
Competency - Service	NA	NA	NA	Yes
Customer	Yes	NA	NA	Yes
Location	NA	Yes	Yes	NA
Product	Yes	Yes	Yes	Yes
Product Group	Yes	Yes	Yes	Yes
Region	Yes	NA	NA	Yes
Site	Yes	NA	NA	Yes
Person Type	No	Yes	No	No
Department	No	Yes	Yes	No
Security Role	No	No	Yes	No

As mentioned in the table, the assignment engine uses the region information to perform service order and support case assignment. A region search occurs when the **Incident Address** group box is available on a Case or Service Order page (according to the associated configuration template) with a specified incident location or when a region is associated with the site, contact, or customer on the transaction. The assignment engine runs the region search based on the zip code that you specify in the incident location.

Note: This is only if the incident location is being displayed. If not, the region is determined by the customer specified. In this case, the region match starts with this region (not the parent region like it does for zip code). The region is derived from a hierarchy based upon the site, contact and customer. When a service order or case is created, the region is determined by obtaining the region, if available, from the site, then the contact and customer. If a new region is specified for the site, customer or contact, there will be no region to match on with the assignment engine.

Before using zip codes as regions as assignment criteria, you must:

• Use the Region component to add zip codes as individual regions.

- Create a region, such as the Santa Clara county, and make it the parent region for all appropriate zip codes.

Note: You should define regions with the category of *Geography*.

When the assignment engine runs, the zip code of the incident location determines the region. The system looks for the zip code with a category of *Geography* in the region table and starts with the parent region for assignment matches.

The system continues to look at the region hierarchy and reports region matches for any provider groups and group members that match the parent or grandparent regions. For example, if the parent region of Santa Clara County is Northern California, then the system includes any provider groups or group members associated with Santa Clara County or Northern California. If the provider group or group member is associated with both Santa Clara and Northern California, the match will be on the lower region (in this case, Santa Clara County).

Case-Specific Assignment Criteria

For assignment searches that you perform for cases, you can match the problem type and CTD competencies of the case with competencies that are defined for group members and provider groups.

You can specify competencies for problem types, categories, specialty types and details to be used when the system performs an assignment search from a case in PeopleSoft Support or HelpDesk.

The assignment engine matches the competency values in these fields on the case with group members or provider groups that are associated with the same competency values. Any provider group or group member that does not meet the minimum competency proficiency defined for the CTD or problem type will not have a match for the competency.

Note: There is a hierarchical relationship among category, specialty type, and detail. A category includes specialty types, which contain details. When all three levels of information are available in a case that needs to be assigned, the value from the lowest available level is used in the assignment search. For example, if the case has a category, specialty type and detail, the assignment uses the competency information that is defined for detail when performing the assignment search. If it has category and specialty type, the system uses the competency information for type. If it has only the category, the system uses the competency information for category.

Service Order-Specific Assignment Criteria

For assignment searches that you perform for service orders, the assignment engine matches (besides general assignment criteria) the competency proficiency of provider groups and group members with the minimum competency proficiency requirements on the service (or service activity). Any provider group or group member that does not meet the minimum competency proficiency that is defined for the service or service activity will not have a match for the competency.

The service competency data that the assignment engine uses depends on:

- Whether competency data is defined for a service or service activity.

- Whether the assignment search is initiated from the service order activity actions section or the service order line.

If activities are defined for the service, the assignment engine uses only the competency requirements that are defined for the activities, even if competencies are also defined for the service.

If you perform the assignment search from the service order activity actions for a service with one or more activities, the system evaluates provider group or group member competency against the competency requirements that are defined for all activities that are associated with the service.

If you perform the assignment search from the service order line, the system considers only the competency requirements of the activity on the line.

If no activities are defined for the service, the assignment engine uses the competency information that is defined for the service. If no competencies are defined for the service, the assignment engine does not perform a competency match; it uses only assignment criteria matches to evaluate candidates for service order assignment.

Weighting Factors

You can define the relative importance of assignment criteria for provider group and group member searches. These weights may differ between the provider group and group member.

For example, if the CTD competency (applicable to support and help desk cases) has no importance when assigning provider groups in cases, but region is important, set the group weight for the CTD competency to *0* and the weight for region to *5*.

If CTD competency and product are equally important and customer is somewhat important for group member searches, you can then set the weights to *5, 5,* and *3,* respectively.

Assignment Search Data Model

This diagram illustrates the information that the assignment engine uses to generate a list of provider groups or worker candidates to assign to tasks on a help desk case, support case, or service order and to display current availability status:

This example illustrates the fields and controls on the Assignment Search Data Model.
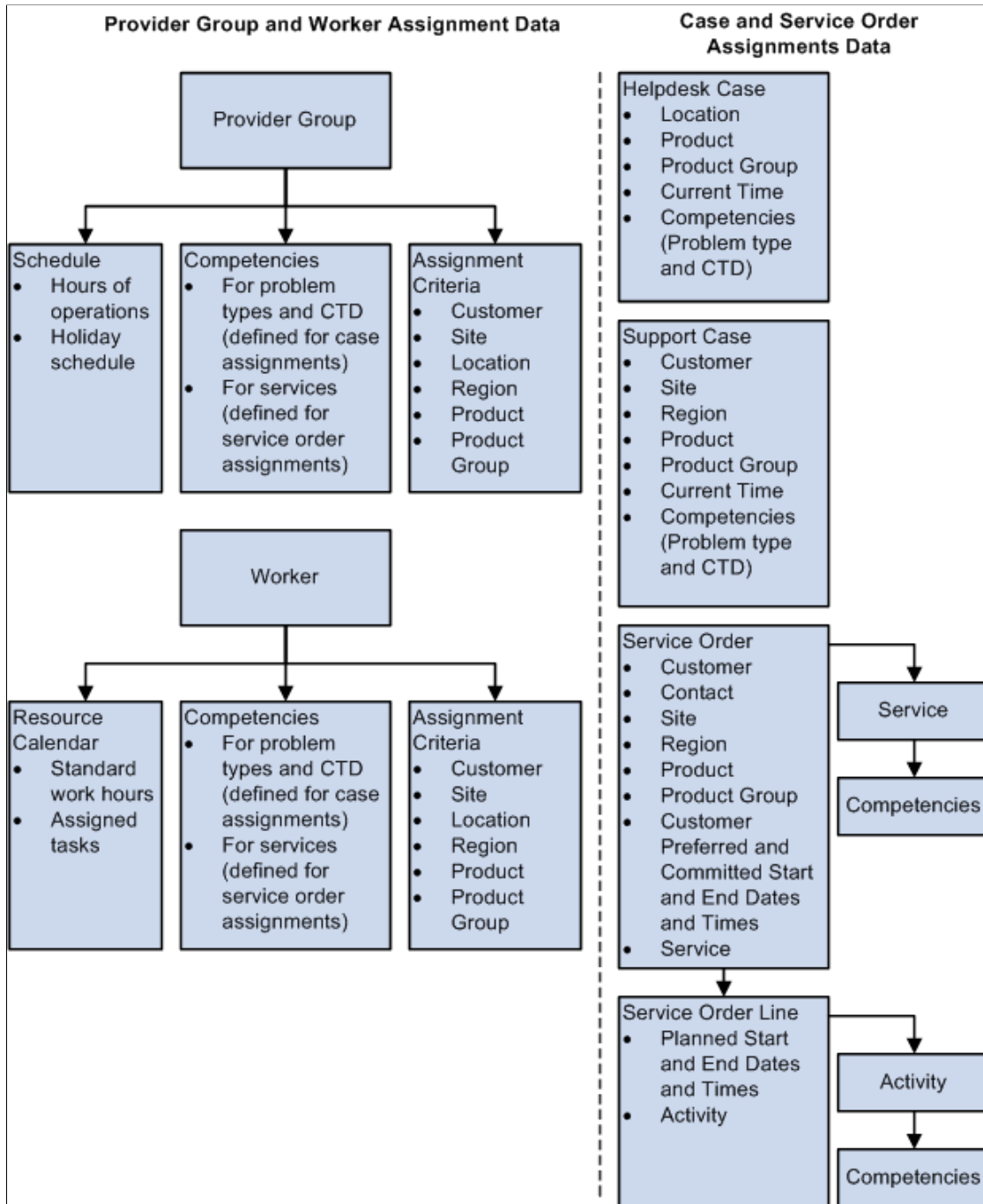
Note: The HelpDesk case, provider group assignment criteria, and worker assignment criteria should also contain the person type.

Related Links

Understanding Competencies in PeopleSoft CRM

"Maintaining Worker Information" (Business Object Management)

Understanding Provider Groups and Group Members

Understanding Calendars

"Defining Products" (PeopleSoft Product and Item Management)

"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)

"Understanding Call Center Prompt Tables" (PeopleSoft Call Center Applications)

Candidate Selection and Fit Score Calculations

For both provider group and group member searches, the assignment engine builds a table in the database that represents each criteria match between provider groups or group members and the values on a service order or case.

After completing the search, the system returns a list of the provider groups or group members with criteria matches. The aggregate fit score of the provider groups or group members sequences the list.

Evaluating Workforce Assignment

For each assignment criteria match between a provider group or group member and the evaluated help desk case, support case, or service order, the system inserts a row into a temporary table called Criteria Fit (RF_ASSIGN_FIT).

Each row includes the name of the group member or provider group, the criteria that was matched, and the relative importance, or weight, of the match. The weight value for the match becomes the number of points that are assigned to the match.

For matches on problem type competency, CTD competency, or both, the number of points depends on the number of competencies and the provider group or group member's proficiency for those competencies.

For service competency matches, the number of points also depends on the number of competencies and the provider group or group member's proficiency for those competencies. For these reasons, the number of competency points may be less than the competency weight.

Determining Workforce Availability

The system determines the availability status of each provider group or group member. For provider groups, the system checks the hours of operation and the holiday schedule that you define for the provider group on the Schedule page in the Provider Group component.

If the customer preferred (or committed, if customer preferred doesn't exist) start and end dates and times on a service order, or the current date and time on a case, correspond to an open period for the provider group, and if the start and end dates are not on their holiday schedule, the provider group is considered available for assignment.

For group members, the system checks for tasks on the worker's resource calendar as well as the worker's schedule.

If the customer preferred start and end dates and times on a service order (if they don't exist, the system uses the committed dates), or the current date and time on a case, correspond to a period during the group member's standard work hours for which no other task has been assigned, the group member is considered available for assignment.

Establish standard workweek and workday hours during installation on the Calendar Options page (select **Set Up CRM** > **Install** > **Installation Options**). You can modify an individual worker's standard hours on the Schedule page in the Worker component.

Displaying Case Load for Candidates

For group member assignment searches that you perform from a case, the system determines how many open cases are currently assigned to the group member. To facilitate workload balancing, this information appears for each agent who is returned for a group member search.

Calculating Candidate Fit Scores

For each provider group or group member with a criteria match that is recorded in the Criteria Fit table, the system sums the weight value that is associated with each criteria match row and calculates the fit score for the provider group or group member using this equation:

This text provides a sample candidate fit scores calculation:

$$\text{Fit score} = \frac{\text{Total number of match points for the provider group or group member}}{\text{Number of possible match points for the case or service order}} \times 100$$

where the number of possible match points is defined by the criteria weight factor.

For example, for a group member assignment search, suppose that Jon Smith matched three assignment criteria (region, customer, and site) on a service order for which no competency requirements were defined, and this is the weight for each of the matching assignment criteria that applies to service orders:

- Customer = 5

- Region = 4

- Product = 3

- Site = 0

- Competency - Service = 4

The total number of possible match points is the total of the weight values: 5 + 4 + 3 + 0 + 4 = 16.

For the service order in this example, Jon Smith matched region, customer, and site. His total number of match points is calculated as follows:

4 + 5 + 0 = 9

Jon's fit score = 9 / 16 x 100 = 56%

Accounting for Competency Proficiency on a Service Order

When calculating fit scores for service order assignments, the assignment engine accounts for the provider group or group member's competency proficiency and the relative importance of the competency that is defined for the service or service activity using this equation:

This text provides a sample competency score calculation:

$$\text{Competency score} = \frac{(C1Wt^*C1CP) + (C2Wt^*C2CP) + \dots (CnWT^*CnCP)}{(C1Wt^*C1MP) + (C2Wt^*C2MP) + \dots (CnWT^*CnMP)}$$

- CnWt is the weight of the competency defined for the service or service activity.

- CnCP is the candidate's proficiency rating for the competency.

- CnMP is the maximum proficiency rating.

For example, suppose that the service order in the previous example was for an air-conditioner maintenance service with no activities. The air-conditioner maintenance service has two competency requirements: basic maintenance and compressor replacement.

The basic maintenance competency requires a minimum proficiency of 2 on a 1 to 6 rating scale, where 6 is the maximum proficiency rating. The compressor replacement competency requires a minimum proficiency of 3 on the same rating scale.

The service definition for air-conditioner maintenance weights the relative importance of the basic maintenance competency for performing the service as a 5 on a 0 to 5 scale, while the relative importance of the compressor replacement competency is weighted at 2 on the same scale.

This table summarizes the competency data for the air-conditioner maintenance service:

Competency	Minimum Proficiency	Relative Importance to the Service (CnWt)	Maximum Proficiency on Rating Model (CnMP)
Basic Maintenance (C1)	2	5	6
Compressor Replacement (C2)	3	2	6

This table shows the competency proficiency rating for three technicians, Jon Smith, Bill Jones, and Jane Markowitz:

Worker	Basic Maintenance Competency Proficiency (C1CP)	Compressor Replacement Competency Proficiency (C2CP)
Jon Smith	4	3
Bill Jones	2	0
Jane Markowitz	5	4

The competency score for each technician is calculated as follows:

Jon Smith's competency score = (5 * 4) + (2 * 3) / (5 * 6) + (2 * 6) = 0.62

Bill Jones' competency score = (5 * 2) / (5 * 6) + (2 * 6) = 0.24

Notice that Bill Jones did not match the proficiency requirements for the compressor replacement competency; therefore, no points for the match are included in the calculation.

Jane Markowitz's competency score = (5 * 5) + (2 * 4) / (5 * 6) + (2 * 6) = 0.79

To calculate the fit score for each worker, the competency score is multiplied by the assignment weighting factor of the corresponding assignment criterion, which is defined for you in your installation.

Let's assume that the same criteria weight factors as in the previous fit score calculation example: Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Service = 4.

Let's also assume that, except for the competency proficiency on competency - service, Jon, Bill, and Jane matched on identical criteria. Their fit scores are calculated as follows:

Jon Smith's fit score = 4+5+0+(4*0.62)/ 5+4+3+0+4 = 0.717

Bill Jones's fit score = 4+5+0+(4*0.24)/ 5+4+3+0+4 = 0.622

Jane Markowitz's fit score = 4+5+0+(4*0.79)/5+4+3+0+4 = 0.76

The assignment engine sorts these candidates:

*   Jane Markowitz, 76%

*   Jon Smith, 72%

*   Bill Jones, 62%

If you view the detail scores, the system displays the criteria matches that compose the fit scores. For example, under Jon Smith's name, you would see this breakdown:

Criteria	Competency	Score
Region	NA	4/16 = 25%
Customer	NA	5/16 = 31.3%
Site	NA	0/16 = 0%
Competency - Service	Basic Maintenance	(4 x (5 x 4) / 42) / 16) = 11.90%
Competency - Service	Compressor Replacement	(4 x (2 x 3) / 42) / 16) = 3.6%

Accounting for Competency Proficiency on a Case

Similar to calculating service and service activity competencies, when the assignment engine calculates fit scores for case assignments, it accounts for the provider group or group member's competency proficiency and the relative importance of the competency values that are specified for problem type or CTD on the case using this equation:

This text provides a sample competency score equation:

$$\text{Competency score} = \frac{(C1Wt*C1CP) + (C2Wt*C2CP) + \ldots (CnWT*CnCP)}{(C1Wt*C1MP) + (C2Wt*C2MP) + \ldots (CnWT*CnMP)}$$

* $CnWt$ is the weight of the competency that is defined for the problem type or CTD.

* $CnCP$ is the candidate's proficiency rating for the competency.

* $CnMP$ is the maximum proficiency rating.

For example, suppose that the case involves a problem with a personal computer (PC) and the required problem type competency and category competency are IBM PC Hardware and PC Configuration, respectively. If Jon Smith has a proficiency of 4 on a 1 to 6 rating scale for both competencies, then Jon's competency score for problem type is:

4 /6 = 0.666

His competency score for the category is also 0.666.

Let's assume that the following criteria weight factors are set:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Jon Smith matches the customer and both competencies on the case, then his fit score is calculated as follows:

Jon Smith's fit score = 5+(4*0.666)+(4*0.666) / 5+4+3+0+4+4 = 0.516 or 52%

Accounting for Product Proficiency on a Service Order or Case

When calculating fit scores for service order and case assignments, the assignment engine accounts for the provider group or group member's product proficiency using this equation:

Product score = PCP/PMP

* PCP is the candidate's proficiency rating for the product.

* PMP is the maximum proficiency rating.

For example, suppose that the case or service order involves a problem with an air conditioner.

If Bill Jones has a proficiency of 2 for this product on a 1 to 6 rating scale, then Bill's product score is:

2 / 6 = 0.333

Let's assume that the criteria weight factors are the same as in the previous examples:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Bill Jones matches the customer and product on the case or service order, this is how his fit score is calculated:

Bill Jones' fit score = 5 + (3*0.333) / 5+4+3+0+4+4 = 0.299 or 30%

Related Links

"Maintaining Worker Information" (Business Object Management)

Setting Up the Assignment Searches

To define assignment searches, use the Worker (RD_WORKER_2), Provider Group (RF_PROVIDER_GRP), Service (RF_SERVICE), Problem Type (RC_PROBTYPE), Category Type Detail (RC_CA_TY_DE) and Assignment Weighting Factors (RF_ASSIGNMENT_WGHT) components.

This topic discusses how to set up assignment searches.

Pages Used to Set Up Assignment Searches

Page Name	Definition Name	Usage
Job Page	RD_ASGN_JOB	Specify a holiday schedule for the worker. This information helps to determine worker's availability.
Work Schedule Page	RD_WORKER_SCHEDULE	Specify worker's workday information if it differs from the information that you define for the installation on the Calendar Option page. This information helps to determine worker's availability.
Skills and Competencies Page	RD_WORKER_CMP_PROF	Associate competency information with the worker. This information is optional.
Assignment Criteria Page	RD_WORKER_CRITERIA	Define assignment criteria for the worker. This information is optional.
Schedule Page	RF_PROVGRP_TIME	Specify a holiday schedule and workday information for the provider group. This information helps to determine provider group's availability.

Page Name	Definition Name	Usage
Assign Group Criteria Page	RF_PRV_GRP_CRIT	Define assignment criteria for the provider group. The Region criterion is required when defining provider groups.
Group Competencies Page	RF_PRVGRP_COMP	Associate competency information with the provider group. This information is optional.
Service Details Page	RF_SERVICE_ATTRIB	Associate competency information with the service. This information is optional.
Service Activities Page	RF_SERVICE_ACT	Associate competency information with the service activity. This information is optional.
Problem Type Page	RC_PROBTYPE	Associate competency information with the problem type. You use problem types to associate competencies with products that a worker needs to resolve a problem with the product. This information is optional.
Category/Type/Detail - Category Page	RC_CTD_CATEGORY	Associate competency information with the category. This information is optional.
Category/Type/Detail - Type Page	RC_CTD_TYPE	Associate competency information with the type. This information is optional.
Category/Type/Detail - Detail Page	RC_CTD_DETAIL	Associate competency information with the detail. This information is optional.
Group Weighting Factors Page	RF_ASSIGN_WGHT_PG	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider groups.

Page Name	Definition Name	Usage
Member Weighting Factors Page	RF_ASSIGNMENT_WGHT	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider group members.
Assignment Setup Page	RF_PRD_RATE_MDL	Specify the rating model that is used to define proficiency levels for product competencies and configure search results.

Job Page

Use the Job page (RD_ASGN_JOB) to specify a holiday schedule for the worker.

This information helps to determine worker's availability.

Navigation:

Workforce > **Search Worker** > **Job**

Note: You are not required to define standard workweek information for your installation or for individual workers. However, the system requires this information to create entries automatically on a worker's calendars when a service order is assigned to the worker.

See "Worker - Job: Job Details Page" (Business Object Management).

See Understanding Holiday Schedules.

Work Schedule Page

Use the Work Schedule page (RD_WORKER_SCHEDULE) to specify worker's workday information if it differs from the information that you define for the installation on the Calendar Option page.

This information helps to determine worker's availability.

Navigation:

Workforce > **Search Worker** > **Work Schedule**

See "Worker - Work Schedule Page" (Business Object Management).

Skills and Competencies Page

Use the Skills and Competencies page (RD_WORKER_CMP_PROF) to associate competency information with the worker.

This information is optional.

Navigation:

Workforce > **Search Worker** > **Skills and Competencies**

See "Worker - Skills and Competencies Page" (Business Object Management).

See Understanding Competencies in PeopleSoft CRM.

Assignment Criteria Page

Use the Assignment Criteria page (RD_WORKER_CRITERIA) to define assignment criteria for the worker.

This information is optional.

Navigation:

Workforce > **Search Worker** > **Assignment Criteria**

See "Worker - Assignment Criteria Page" (Business Object Management).

See Defining Group Assignment Criteria and Competencies.

Related Links
Understanding Provider Groups and Group Members

Schedule Page

Use the Schedule page (RF_PROVGRP_TIME) to specify a holiday schedule and workday information for the provider group.

This information helps to determine provider group's availability.

Every worker who can be assigned to a case or a service order must be associated with an active provider group. Define provider groups using the Provider Groups component.

Navigation:

Workforce > **Provider Groups** > **Schedule**

See Defining Schedules for Provider Groups.

Assign Group Criteria Page

Use the Assign Group Criteria page (RF_PRV_GRP_CRIT) to define assignment criteria for the provider group.

The Region criterion is required when defining provider groups.

Navigation:

Workforce > **Provider Groups** > **Assign Group Criteria**

See <u>Assign Group Criteria Page</u>.

Group Competencies Page

Use the Group Competencies page (RF_PRVGRP_COMP) to associate competency information with the provider group.

This information is optional.

Navigation:

Workforce > **Provider Groups** > **Group Competencies**

See <u>Group Competencies Page</u>.

Service Details Page

Use the Service Details page (RF_SERVICE_ATTRIB) to associate competency information with the service.

This information is optional.

Navigation:

Set Up CRM > **Product Related** > **FieldService** > **Services** > **Service Details**

See "Understanding the Service Data Model" (PeopleSoft Integrated FieldService).

See "Defining Services" (PeopleSoft Integrated FieldService).

See "Defining Activities" (PeopleSoft Integrated FieldService).

Problem Type Page

Use the Problem Type page (RC_PROBTYPE) to associate competency information with the problem type.

Use problem types to associate competencies with products that a worker needs to resolve a problem with the product. This information is optional.

Navigation:

Set Up CRM > **Product Related** > **Call Center** > **Problem Type** > **Problem Type**

See "Setting Up Basic Prompt Tables for Cases" (PeopleSoft Call Center Applications).

Category/Type/Detail - Category Page

Use the Category/Type/Detail - Category page (RC_CTD_CATEGORY) to associate competency information with the category.

This information is optional.

Navigation:

Set Up CRM > **Product Related** > **Call Center** > **Category/Type/Detail** > **Category**

See "Setting Up Basic Prompt Tables for Cases" (PeopleSoft Call Center Applications).

Category/Type/Detail - Type Page

Use the Category/Type/Detail - Type page (RC_CTD_TYPE) to associate competency information with the type.

This information is optional.

Navigation:

Set Up CRM > **Product Related** > **Call Center** > **Category/Type/Detail** > **Type**

See "Setting Up Basic Prompt Tables for Cases" (PeopleSoft Call Center Applications).

Category/Type/Detail - Detail Page

Use the Category/Type/Detail - Detail page (RC_CTD_DETAIL) to associate competency information with the detail.

This information is optional.

Navigation:

Set Up CRM > **Product Related** > **Call Center** > **Category/Type/Detail** > **Detail**

See "Setting Up Basic Prompt Tables for Cases" (PeopleSoft Call Center Applications).

Group Weighting Factors Page

Use the Group Weighting Factors page (RF_ASSIGN_WGHT_PG) to establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider groups.

Navigation:

Set Up CRM > **Common Definitions** > **Codes and Auto Numbering** > **Assignment Weighting Factors** > **Group Weighting Factors**

This example illustrates the fields and controls on the Group Weighting Factors page.

Select the relative importance of a provider group's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management only), and sites (service orders and support cases).

Related Links

Understanding Provider Groups and Group Members

Member Weighting Factors Page

Use the Member Weighting Factors page (RF_ASSIGNMENT_WGHT) to establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, department, person type, role, and competency values on CTD, problem type, and service during assignment searches for provider group members.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Assignment Weighting Factors > Member Weighting Factors

This example illustrates the fields and controls on the Member Weighting Factors page.

Select the relative importance of a of a group member's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), person type (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management), and sites (service orders and support cases).

Assignment Setup Page

Use the Assignment Setup page (RF_PRD_RATE_MDL) to specify the rating model that is used to define proficiency levels for product competencies and configure search results.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Assignment Weighting Factors > Assignment Setup

This example illustrates the fields and controls on the Assignment Setup page.

Group Weighting Factors	Member Weighting Factors	**Assignment Setup**

SetID CRM01

Options

*Rating Model	PSCM
*Default Assignment Page	Summary Assignment Page

☐ **Display Provider Groups and Group Members with no Criteria Matches**

Field or Control	*Description*
Rating Model	Enter the rating model to indicate required proficiency levels for products. Establish rating models on the Competency Rating Model page.
Default Assignment Page	Select the page that the system initially returns when you perform a search. Values are: *Summary:* The system displays the Provider Group Summary page when you perform a provider group search and the Candidate Summary page when you perform a provider group member search for a technician or agent. *Detail:* The system displays the Provider Group Detail page when you perform a provider group search and the Candidate Detail page when you provide a provider group member search for a technician or agent.
Display Provider Groups and Group Members with no Criteria Matches	Select to enable all provider groups and group members to appear as part of the assignment engine search results when you click **Suggest a Provider Group** or **Suggest a Group Member** from a case or service order. Clear this check box if only the provider groups and group members that have criteria matches should appear in the search results.

Related Links
Competency Rating Model Page

Reviewing and Assigning Provider Groups

This topic lists common elements and discusses how to review and assign provider groups.

Pages Used to Review and Assign Provider Groups

Page Name	Definition Name	Usage
Provider Group Summary Page	RF_ASSIGN_PG_SEC	Review the provider group search result (summary view) and select a provider group that you can assign to a service order or a case.
Provider Group Detail Page	RF_ASSIGN_PGDT_SEC	Review the provider group search result (detail view). You can select a provider group that you can assign to a service order or a case from here as well.

Related Links

"Setting Up Automatic Service Order Assignments" (PeopleSoft Integrated FieldService)

Common Elements Used in Reviewing and Assigning Provider Groups

Field or Control	Description
Provider Group Name	Displays the name of the eligible provider group. Click the **Transfer to Provider Group** button next to the name to access the Provider Group component and view the provider group definition record.
Select	Click to assign the selected provider group to the corresponding service order or case.
Available	Displays the group or group member's availability. A green circle indicates availability; a red square indicates unavailability. **Note:** The **Available** column does not appear if you do not specify a start or end period on the service order.
Score	Displays the provider group's score for the criteria match based on the assignment weight factor that is defined on the Group Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the provider group.
Return To Service Order and **Return To Case**	Click to return to the component (service order or case, respectively), where you access this page.

Provider Group Summary Page

Use the Provider Group Summary page (RF_ASSIGN_PG_SEC) to review the provider group search result (summary view) and select a provider group that you can assign to a service order or a case.

Navigation:

- On the Service Order - Activities page in PeopleSoft FieldService, click the **Suggest Group** button.

  Click the **Summary** link if the Provider Group Detail page appears.

- On the Case page in PeopleSoft Support or HelpDesk, click the **Suggest a Provider Group** button.

  Click the **Summary** link if the Provider Group Detail page appears.

- On the Dispatch Board page click the **Suggest a Provider Group** button.

- On the Change Request Task page, click the **Suggest Assignments** button.

This example illustrates the fields and controls on the Provider Group Summary page.
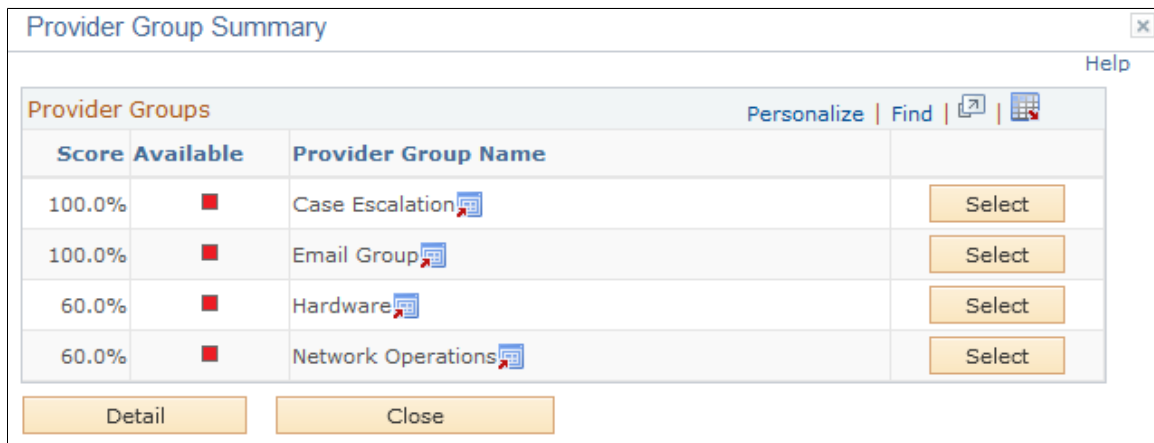
The Provider Group Summary page lists provider groups that matched at least one assignment criteria value on the case or service order.

Field or Control	Description
Detail	Click to access the Provider Group Detail page and view the assignment weight factors that are used to calculate the fit scores.

Provider Group Detail Page

Use the Provider Group Detail page (RF_ASSIGN_PGDT_SEC) to review the provider group search result (detail view).

You can select a provider group that you can assign to a service order or a case from here as well.

Navigation:

- On the Service Order - Activities page in PeopleSoft FieldService, click the **Suggest Group** button.

  Click the **Detail** link if the Provider Group Summary page appears.

- On the Case page in PeopleSoft Support or HelpDesk, click the **Suggest a Provider Group** button.

  Click the **Detail** link if the Provider Group Summary page appears.

- On the Change Request Task page, click the **Suggest Assignments** button. Click the **Detail** link if the Provider Group Summary page appears.

- On the Dispatch Board page click the **Suggest a Provider Group** button.

  Click the **Detail** link if the Provider Group Summary page appears.

This example illustrates the fields and controls on the Provider Group Detail page.
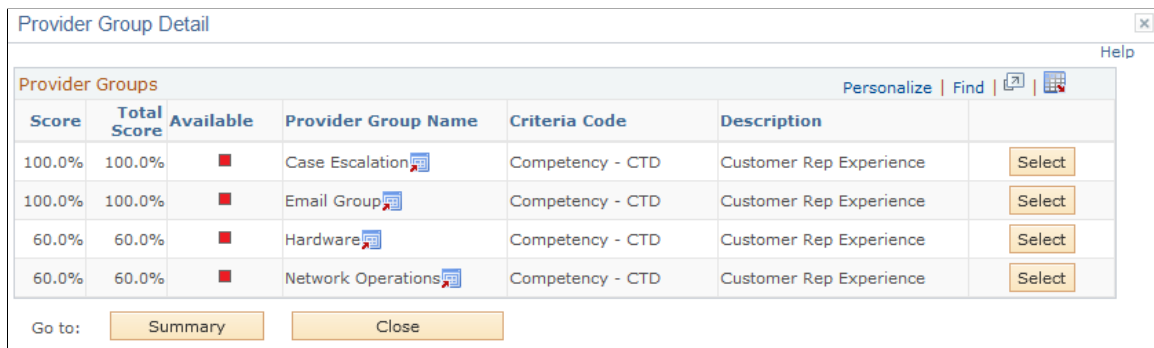
Field or Control	Description
Summary	Click to access the Provider Group Summary page.
Criteria Code	Displays the assignment criterion on the case or service order that the provider group matched.

Reviewing and Assigning Group Members

This topic lists common elements and discusses how to review and assign group members.

Pages Used to Review and Assign Group Members

Page Name	Definition Name	Usage
Candidate Summary Page	RF_ASSIGN_LIST_SEC	Review the group member search result (summary view) and select group members that you can assign to a service order or a case.

Page Name	Definition Name	Usage
Candidate Detail Page	RF_ASSIGN_DET_SEC	Review the group member search result (detail view). You can select a group member that you can assign to a service order or a case from here as well.

Related Links

"Setting Up Automatic Service Order Assignments" (PeopleSoft Integrated FieldService)

Common Elements Used in Reviewing and Assigning Group Members

Field or Control	Description
Select	Select this check box to indicate a group member to assign, and then click the **Select** button. If the assignment is for a service order line, you can select multiple group members.
Name	Displays the name of the eligible group member. Click the **Transfer to Worker** button to access the Worker component and view the worker definition record.
Cases	Displays the number of cases that are assigned to an agent. This column appears only for worker assignment searches that you perform from a case in PeopleSoft Support or HelpDesk.
Score	Displays the group member's score for each criteria match based on the criteria assignment weight factor for the criteria code that you define on the Member Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the group member.
Return To Service Order and **Return To Case**	Click to return to the service order or case from which you accessed this page.

Candidate Summary Page

Use the Candidate Summary page (RF_ASSIGN_DET_SEC) to review the group member search result (detail view).

You can select a group member that you can assign to a service order or a case from here as well.

Navigation:

• On the Service Order - Activities page in PeopleSoft FieldService, click the **Suggest Group Member** button.

Click the **Detail** link if the Candidate Summary page appears.

• On the Case page in PeopleSoft Support or HelpDesk, click the **Suggest an Agent** button.

Click the **Detail** link if the Candidate Summary page appears.

• On the Dispatch Board page, click the **Suggest Group Member** button.

Click the **Detail** link if the Candidate Summary page appears.

This example illustrates the fields and controls on the Candidate Summary page.

The Candidate Summary page lists the members in the provider group who matched at least one assignment criteria value on the case or service order, or all provider group members if you select the *Display Provider Groups and Group Members with no Criteria Matches* check box on the Assignment Setup page. For support and help desk cases, the system shows the number of open cases that are currently assigned to each group member on the list.

Note: You must specify a provider group on the case or service order before performing a search on group members.

Field or Control	Description
Detail	Click to access the Candidate Detail page and view the assignment weight factors that are used to calculate the total fit scores.

Candidate Detail Page

Use the Candidate Detail page (RF_ASSIGN_LIST_SEC) to review the group member search result (summary view) and select group members that you can assign to a service order or a case.

Navigation:

• On the Service Order - Activities page in PeopleSoft FieldService, click the **Suggest Group Member** button.

Click the **Summary** link if the Candidate Detail page appears.

- On the Case page in PeopleSoft Support or HelpDesk, click the **Suggest an Agent** button.

  Click the **Summary** link if the Candidate Detail page appears.

- On the Dispatch Board page, click the **Suggest Group Member** button.

  Click the **Summary** link if the Candidate Detail page appears.

This example illustrates the fields and controls on the Candidate Detail page.

Candidate Detail							× Help
Candidates					Personalize | Find | ⬈ | ⊞		
Score	Total Score	Available	Name	Criteria Code	Description	Cases	
100.0%	100.0%	■	Erin McCoy	Competency - CTD	Customer Rep Experience	0	Select
100.0%	100.0%	■	Joe Dillon	Competency - CTD	Customer Rep Experience	8	Select
80.0%	80.0%	■	Brian Kevell	Competency - CTD	Customer Rep Experience	0	Select
	Go to:	Summary		Close			
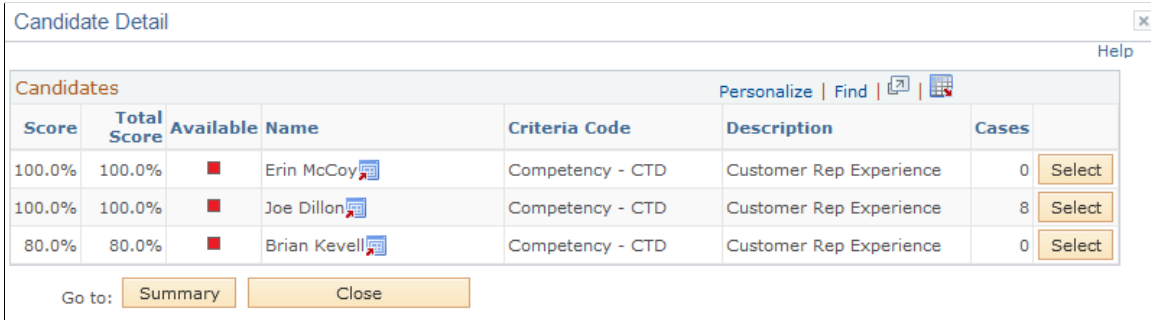
Field or Control	*Description*
Summary	Click to return to the Candidate Summary page.
Criteria Code	Displays the assignment criterion on the case or service order that the candidate matched. Associate values for each criteria code with workers on the Assign Criteria page in the Worker component.

Chapter 15

Defining Holiday Schedules

Understanding Holiday Schedules

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can associate holiday schedules with provider groups and individual workers. You can schedule a process to update worker calendars to reflect holiday information. On calendars, holidays appear as a type of task.

In PeopleSoft Integrated FieldService, the assignment engine indicates on the assignment search result that an eligible provider group or worker is unavailable for assignment if the period that the committed start and end dates defined on a service order coincides with a defined holiday.

Similarly, in PeopleSoft call center applications, the assignment engine indicates that a provider group or worker is unavailable for case assignment if the date on which you perform the assignment search corresponds with a defined holiday. (Regardless of availability, however, you can always manually assign provider groups and workers to a case or service order.)

Important! Workers do not inherit holiday schedules from their provider groups.

Because workers can belong to multiple provider groups, you must define and maintain holiday schedules for workers and provider groups separately. If you want workers to inherit holiday schedules from their provider groups, you must institute a manual process to ensure synchronization of holiday schedules.

Defining Holiday Schedules, Time Frames, and Sales Quota Rollups

To define holiday schedules, time frames and sales quotas, use the Installation (RB_INSTALLATION), Holiday Schedule (HOLIDAY_SCHED_TBL) and Time Frames (RSF_TF) components.

This topic discusses how to define holiday schedules, time frames and sales quota rollups.

Pages Used to Define Holiday Schedules

Page Name	Definition Name	Usage
Calendar Options Page	RF_INSTALLATION	Define standard workday information. The system uses the start and end times on this page as the start and end times of any holiday that you define. The system displays these times on workers' calendars.

Page Name	Definition Name	Usage
Holiday Schedule Page	HOLIDAY_SCHED_TBL	Define holidays.
Timeframes Page	RSF_TF_MAIN	Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
Sales Information Page	RSF_TF	Define time frames for sales quota rollups.

Calendar Options Page

Use the Calendar Options page (RF_INSTALLATION) to define standard workday information.

The system uses the start and end times on this page as the start and end times of any holiday that you define. The system displays these times on workers' calendars.

Navigation:

Set Up CRM > **Install** > **Installation Options** > **Calendar Options**

See Setting Up PeopleSoft CRM Application Installation Options.

Holiday Schedule Page

Use the Holiday Schedule page (HOLIDAY_SCHED_TBL) to define holidays.

Navigation:

Set Up CRM > **Common Definitions** > **Calendars and Schedules** > **Holiday Schedule** > **Holiday Schedule**

This example illustrates the fields and controls on the Holiday Schedule page.

When you add a new date to the list of holidays, enter a description (up to 30 alphanumeric characters). This description appears on the workers' calendars.

Timeframes Page

Use the Timeframes page (RSF_TF_MAIN) to define time frames for forecasting, pipeline analysis, planning and portfolio examination.

Navigation:

Set Up CRM > **Common Definitions** > **Calendars and Schedules** > **Schedule Time Frames** > **Timeframes**

This example illustrates the fields and controls on the Timeframes page.

Period Definition Tab

Select the **Period Definition** tab.

Select the period (for example, annual, daily, monthly quarterly, and so on) for the time frame.

Enter a description of the period (for example, Q1, 2005 FY, and so on). The **Time Frame** field uses the name that you enter for the time frame and the text that you enter in the **Period** field to enter a description of the time frame.

Select the begin and end dates and then enter a long and short description for the period.

Usage and Status Tab

Select the **Usage and Status** tab.

Use the **Period Use** field to indicate how you plan to use the information generated in the time frame that you are defining. You can select either *All, Pipeline Only, Forecast and Pipeline,* and *Planning and Portfolio.* Use the **Status** field to indicate the status of the usage for the time frame.

Sales Information Page

Use the Sales Information page (RSF_TF) to define time frames for sales quota rollups.

Navigation:

Set Up CRM > Common Definitions > Calendars and Schedules > Time Frames > Sales Information

This example illustrates the fields and controls on the Sales Information page.

After you enter the time frames on the Timeframes page and save it, select the **Sales Information** tab and enter quota information for the time frame group that is being defined.

Quota Information

Use the fields in this group box to define sales quotas by period definition (for example, annual, biweekly, daily, monthly, and so on). You can also use the **Define Detailed Quotas** option to define revenue details by business unit, product, product group, industry, region, revenue type, and territory.

Quota Rollup Tab

Select the **Quota Rollup** tab.

Use the **Quota Rollup Period** field to select the time period that the period should roll up to for reporting or forecasting reasons.

For example, suppose that you are entering monthly time frames based on a quarterly reporting system, the April, May and June periods should roll up to the 2nd quarter rollup period.

Associating Provider Groups with Holiday Schedules

Specify the appropriate holiday schedule on the Schedule page under **Workforce** > **Provider Groups** > **Schedule.**

The assignment engine checks the holiday schedule and hours of operation that you define for a provider group to determine whether an eligible provider group is available for assignment to a service order or case.

Related Links
Defining Schedules for Provider Groups

Associating Workers with Holiday Schedules

Associate workers with the appropriate holiday schedule on the Job Detail page under **Workforce** > **Worker** > **Job Detail.**

When you select a holiday schedule for a worker, the system updates the worker's calendar to reflect the selected holiday schedule when you save the record. If you don't select a holiday schedule for a worker, no holidays are reflected on the worker's calendar.

Note: If you change a worker's holiday schedule on the Job Detail page, when a user saves the page, the system deletes all existing holidays on the worker's calendar and records the holidays of the new schedule starting from the beginning of the calendar year.

Related Links
"Worker - Assignment Criteria Page" (Business Object Management)

Updating Workers' Calendars with Specified Holiday Schedules

This topic discusses how to update workers' calendars with specified holiday schedules.

Page Used to Update Workers' Calendars with Specified Holiday Schedules

Page Name	*Definition Name*	*Usage*
Holiday Load Page	RUN_CNTL_RF1000	Update workers' calendars with specified holiday schedules.

Holiday Load Page

Use the Holiday Load page (RUN_CNTL_RF1000) to update workers' calendars with specified holiday schedules.

Navigation:

Workforce > **Load Holidays** > **Holiday Load**

This example illustrates the fields and controls on the Holiday Load page.

You should maintain one holiday schedule per region or per segment of your workforce and periodically add new dates to each holiday schedule to reflect the next year's official holidays. When you add additional dates to the holiday schedules that you define with the Holiday Schedule page, run the Load Holiday process (RF_HOLIDAY) .

For example, you might define next year's holidays in the last quarter of this year. After defining the holiday dates for the coming year, run the Load Holiday process to have the system record the new dates on workers' calendars.

Note: When you run the Load Holiday process, the system updates workers' calendars to reflect the changes in the associated holiday schedule from the current date forward. If you delete a holiday for a date prior to the current date, the system does not delete the past holiday from the calendars. However, if you delete or add a holiday for a future date, the system updates calendars to reflect the holiday schedule changes.

Load Criteria

The **Load Criteria** group box indicates the parameters for the Holiday Load process. Before running the process, you must associate a holiday schedule with each worker who needs the update on the Job Detail page.

Field or Control	Description
One Worker	Select to load the holiday schedule for the worker who you specify in the **Name** field. The system displays the **Name** field after you select this option.

Field or Control	Description
All Workers/One Schedule	Select to load the holiday schedule that you specify in the **Holiday Schedule** field for all workers who are currently defined in the system and have the specified holiday schedule. The system displays the **Holiday Schedule** field after you select this option.
All Workers/All Schedules	Select to load all holiday schedules that are associated with each worker in the system.

See *PeopleTools: Process Scheduler* product documentation.

Chapter 16

Using Calendars

Understanding Calendars

In PeopleSoft Customer Relationship Management (PeopleSoft CRM) every worker has access to their own My Calendar page to view their monthly, weekly, or daily calendars. Managers can update calendars to reflect daily tasks. In PeopleSoft Sales, system events can automatically update sales representatives' calendars to reflect leads and opportunities.

Similarly, in PeopleSoft Integrated FieldService, system events can automatically update technicians' calendars to reflect service order assignments. When suggesting eligible candidates to assign to a service order and case, the system checks for worker availability. If a worker has another task scheduled, or if the start and end times of the task are not within the worker's scheduled work hours, the system indicates that the worker is unavailable.

Calendars and Tasks

The calendar is another way to view tasks. To appear in the calendar, a task must satisfy these conditions:

• The **Show In Calendar** check box must be selected when the task type is defined.

• The task must have a start date, start time, end date and end time.

• A task appears in the calendar of assignees or invitees only if the person accepts the task or invitation.

Note: If a calendar item is linked to a transaction (for example, company, lead, or opportunity) the system displays the appropriate page for that transaction when the user clicks the link for the task subject. If the task is not linked to a transaction, the system displays the Task Details page. Also, if a task spans multiple days, the system displays the task only on the start date on the calendar page.

Related Links

Understanding Assignment Searches
"Understanding Territory Trees" (PeopleSoft Sales)
Understanding Task Management

Setting Up Calendars

This topic discusses how to set up calendars.

Pages Used to Set Up Calendars

Page Name	Definition Name	Usage
Daily Calendar Page	RB_TSK_CALENDAR	View a worker's daily calendar.
Weekly Calendar Page	RB_TSK_CALENDAR	View a worker's weekly calendar.
Monthly Calendar Page	RB_TSK_CALENDAR	View a worker's monthly calendar.
My Tasks - User Options Page	RB_TSK_PREF_SEC	Set the default calendar view (daily, weekly, or monthly) and delegate tasks to others for a period of time. See Also My Tasks - User Options Page

Common Elements Used in Setting Up Calendars

Field or Control	Description
Daily	Click this toolbar button to go to the daily calendar page.
Weekly	Click this toolbar button to go to the weekly calendar page.
Monthly	Click this toolbar button to go to the monthly calendar page.
View Another's Calendar	Click this link to go to the Another's Calendar search page to view calendars of other workers. Depending on how you implement security, a worker may not be able to view the calendars of other workers. It is more typical for managers to use this link to view the calendars of the people that report to them.
View My Team's Calendar	Click this link to view the calendar for your sales team.
View Provider Group's Calendar	Click this link to view the calendar for any provider group to which you belong. Only tasks that are associated to the provider group (not just owned by an individual provider group member) will be displayed on the calendar. This will only be displayed if the current user is a member of one or more provider groups.
Add Task	Click this toolbar button to access the Task Details page and add task entries. For specific information on adding task entries refer to the topic on Managing Tasks. See Managing Tasks.

Field or Control	Description
Calendar Item Entry	Click this link to go to the page that displays the calendar item. This could be a service order, case, lead, opportunity, or the Task Details page where a user can view and change meeting times, appointments, scheduled phone calls, reminders, and to do items.

Daily Calendar Page

Use the Daily Calendar page (RB_TSK_CALENDAR) to view a worker's daily calendar.

Navigation:

- Click the **Daily Calendar** button next to the worker's name on the dispatch board in PeopleSoft FieldService.

- Click the gray bar that represents a task for a worker on the dispatch board in PeopleSoft FieldService.

- Click a day on the Monthly Calendar or Weekly Calendar page.

This example illustrates the fields and controls on the Daily Calendar page.

Field or Control	Description
Go To	Displays the date for the events appearing on the calendar. To view different days, enter a new date, select a new date using the **Choose a date** button or use the **Next Day** and **Previous Day** arrows.
31	Click the **Choose a date** button to access the Daily Calendar page for another date.
Daily, Weekly, or Monthly	Click any one of these buttons to get a different view of the currently displayed calendar.
View My Calendar, View Another's Calendar, View My Team's Calendar, View Provider Group's Calendar	Click any of these links to view the specified calendar.

Related Links

"Understanding Service Orders" (PeopleSoft Integrated FieldService)

"Understanding Sales Users" (PeopleSoft Sales)

Weekly Calendar Page

Use the Weekly Calendar page (RB_TSK_CALENDAR) to view a worker's weekly calendar.

Navigation:

Click **the Weekly Calendar** toolbar button on the Daily Calendar or Monthly Calendar page.

This example illustrates the fields and controls on the Weekly Calendar page.

Field or Control	Description
Go To	Displays the current date. To display a new calendar enter a new date, select a new date using the **Choose a date** button or use the **Next Week** and **Previous Week** arrows.
📅	Click the **Choose a date** button to access the calendar page for another date. **Note:** You can also click the link under the day of the week to go to the worker's daily calendar for that day.

Monthly Calendar Page

Use the Monthly Calendar page (RB_TSK_CALENDAR) to view a worker's monthly calendar.

Navigation:

Click **Monthly Calendar** toolbar button on the Daily Calendar or Weekly Calendar page.

This example illustrates the fields and controls on the Monthly Calendar page.

Field or Control	Description
Go To	Displays the month and year for the events appearing on the calendar. Select a new month and year to go to a different calendar for the worker. To access a calendar for a different month, click the **Next Month** and **Previous Month** arrows. **Note:** You can also click the link under the day of the week to access the worker's daily calendar for that day.

Field or Control	Description
Current Month	Click to return to the calendar for the current month after navigating to other months or years. The system highlights the current day and displays nonwork days in light gray. This link only appears if you are not in the current month.

Related Links

"Understanding Workers in CRM" (Business Object Management)

My Tasks - User Options Page

Use the My Tasks - User Options page (RB_TSK_PREF_SEC) to set the default calendar view (daily, weekly, or monthly) and delegate tasks to others for a period of time.

Navigation:

My Tasks

Click the **Options** button on the toolbar in the My Tasks component.

Viewing Team Calendars

This topic provides an overview on team calendars.

Pages Used to View Team Calendars

Page Name	Definition Name	Usage
Daily Team Calendar of <Name> Page	RB_TSK_CALENDAR	View the calendars of your team for a single day.
Weekly Team Calendar of <Name> Page	RB_TSK_CALENDAR	View the calendars of your team for a single week.
Monthly Team Calendar of <Name> Page	RB_TSK_CALENDAR	View the calendars of your team for a single month.
Another's Calendar for <Name> Page	RB_TSK_GCAL_SRCH	Search for and view other people's calendars.

Understanding Team Calendars

Using team calendars, sales managers can view the calendar of their resources to evaluate their team's bandwidth to work on new leads and opportunities.

Having the functionality to view their team's calendar on a single page enables sales managers to more easily identify the specific meetings, conference calls, events and appointments that they might want to attend, which have been set up by their team members.

Daily Team Calendar of <Name> Page

Use the Daily Team Calendar of <Name> page (RB_TSK_CALENDAR) to view the calendars of your team for a single day.

Navigation:

• Click the **My Calendar** link.

- Click the **View My Team Calendars** link

This example illustrates the fields and controls on the Daily Team Calendar of <Name> page.
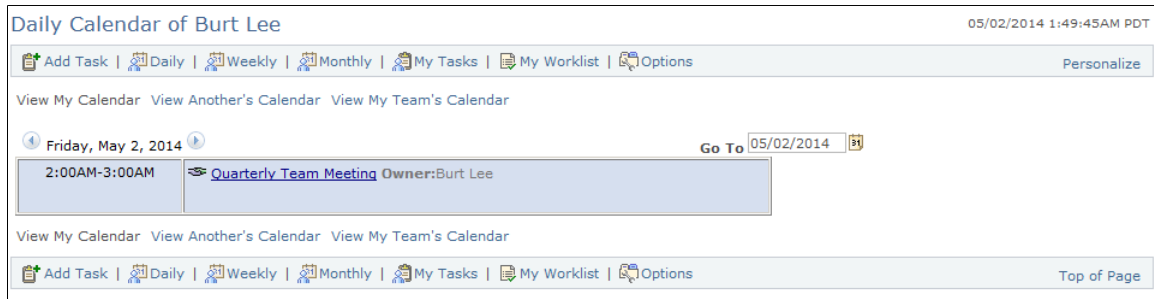
Related Links
Daily Calendar Page

Weekly Team Calendar of <Name> Page

Use the Weekly Team Calendar of <Name> page (RB_TSK_CALENDAR) to view the calendars of your team for a single week.

Navigation:

Click the **Weekly** toolbar button on the Daily Team Calendar or Monthly Team Calendar page.

This example illustrates the fields and controls on the Weekly Team Calendar of <Name> page.

Related Links

Weekly Calendar Page

Monthly Team Calendar of <Name> Page

Use the Monthly Team Calendar of <Name> page (RB_TSK_CALENDAR) to view the calendars of your team for a single month.

Navigation:

Click the **Monthly** toolbar button on the Daily Team Calendar of <Name> or Weekly Team Calendar of <Name> page.

This example illustrates the fields and controls on the Monthly Team Calendar of <Name> page.

Related Links

Monthly Calendar Page

Another's Calendar for <Name> Page

Use the Another's Calendar for <Name> page (RB_TSK_GCAL_SRCH) to search for and view other people's calendars.

Navigation:

Click the **View Another's Calendar** link on the Daily Team Calendar of <Name>, Weekly Team Calendar of <Name>, or Monthly Team Calendar of <Name> page.

This example illustrates the fields and controls on the Another's Calendar for <Name> page.

Enter your search criteria in the fields within the Search group box and then click the search button at the bottom of the page. The system displays a list of names and their departments. Click the person's name whose calendar you want to view. The system takes you to that person's Daily Calendar page.

Viewing Provider Group Calendars

This section provides an overview on provider group calendars.

Pages Used to View Provider Group Calendars

Page Name	Definition Name	Usage
Daily Provider Group Calendar of <Name> Page	RB_TSK_CALENDAR	View the calendars of your provider group for a single day.
Weekly Provider Group Calendar of <Name> Page	RB_TSK_CALENDAR	View the calendars of your provider group for a single week.
Monthly Provider Group Calendar of <Name> Page	RB_TSK_CALENDAR	View the calendars of your provider group for a single month.

Understanding Provider Group Calendars

By using provider group calendars, members of a provider group can view the tasks and calendar for their group. The only tasks listed on the calendar are those that are assigned to the provider group (and whose task types are configured to display on the calendar).

See Understanding Task Management.

Daily Provider Group Calendar of <Name> Page

Use the Daily Provider Group Calendar of <Name> page (RB_TSK_CALENDAR) to view the calendars of your provider group for a single day.

Navigation:

• Click the **My Calendar** link.

• Click the **View Provider Group's Calendar** link

This example illustrates the fields and controls on the Daily Provider Group Calendar of <Name> page.
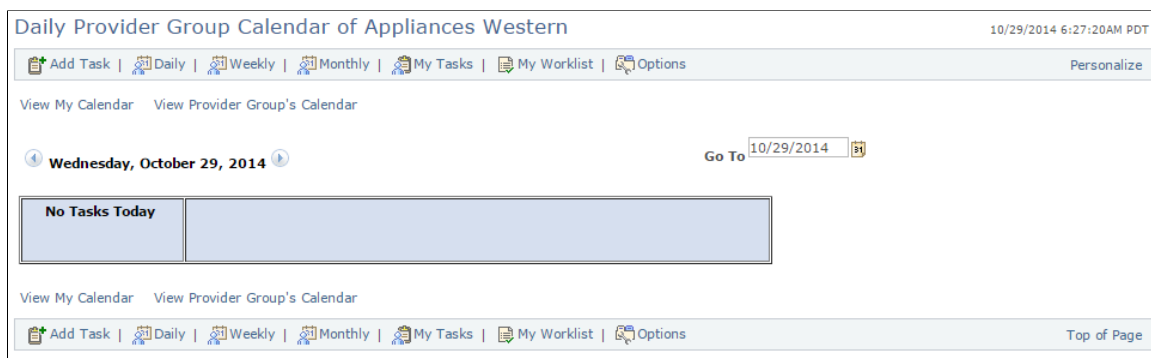
Related Links
Daily Calendar Page

Weekly Provider Group Calendar of <Name> Page

Use the Weekly Provider Group Calendar of <Name> page (RB_TSK_CALENDAR) to view the calendars of your provider group for a single week.

Navigation:

Click the **Weekly** toolbar button on the Daily Provider Group Calendar of <Name> or Monthly Provider Group's Calendar of <Name> page.

This example illustrates the fields and controls on the Weekly Provider Group Calendar of <Name> page.

Related Links

Weekly Calendar Page

Monthly Provider Group Calendar of <Name> Page

Use the Monthly Provider Group Calendar of <Name> page (RB_TSK_CALENDAR) to view the calendars of your provider group for a single month.

Navigation:

Click the **Monthly** toolbar button on the Daily Provider Group Calendar of <Name> or Weekly Provider Group's Calendar of <Name> page.

This example illustrates the fields and controls on the Monthly Provider Group Calendar of <Name> page.

Related Links
Monthly Calendar Page

Integrating Calendars with Third-Party Applications

PeopleSoft CRM delivers two enterprise integration points (EIPs)—Calendar/Task and Task Type—to integrate the calendar functionality with third-party voice recognition applications.

Chapter 17

Working with Interactions

Understanding Interactions

This topic discusses:

- Interactions and subinteractions.

- Contact methods and status.

- Interaction creation.

- Interaction display.

- Interaction notes.

Interactions and Subinteractions

Interactions are communications between you and customers or workers. At the practical level, an interaction is, essentially, a call. Tracking such communications provides valuable insight into customer- and worker-related activities.

Subinteractions are interactions that relate to a specific PeopleSoft CRM transaction (or call type), such as a lead, order, or case. In essence, subinteractions are the activities that occur during a call. Notes that are associated with an interaction are also subinteractions. A single interaction can have zero, one, or many subinteractions.

External Customers Versus Workers

You create different types of subinteractions depending on whether an interaction is for an external customer or a worker. In most CRM applications, customers are external to an organization. Any person or organization whose data that you manage in one of the customer components (Company, Person, or Site) is considered an external customer. However, in PeopleSoft HelpDesk and HelpDesk for Human Resources, customers are internal people whose data you manage in the Worker component.

The Worker component enables you to manage data for help desk internal customers and for CRM staff users such as salespeople, call center agents, and field service technicians. A worker can function as either a customer or as CRM staff; therefore, the creation of a worker interaction is context-dependent. Worker interactions are created only from the context of a help desk case, an HR help desk case, or on the Worker 360-Degree View page.

For example, if you open a helpdesk case for Mark Anderson, any correspondence that you send to Mark from that case is logged as an interaction, and the case itself becomes a subinteraction. If Mark is also a customer service representative, he might receive notifications that are related to cases for other callers. These notifications are not logged as interactions because, in this context, Mark is a contact, not a customer.

Subinteraction Types

You can create the following basic PeopleSoft CRM transactions as subinteractions of external customer interactions:

- PeopleSoft Support cases.

- PeopleSoft Sales leads.

- PeopleSoft Sales opportunities.

- All types of PeopleSoft Order Capture (collectively known as *order captures)*.

- Installed products.

- PeopleSoft FieldService service orders.

- Notes.

You can create the following PeopleSoft CRM transactions as subinteractions of worker interactions:

- PeopleSoft HelpDesk cases.

- PeopleSoft HelpDesk for Human Resources cases.

- Notes.

Note: Additional types of subinteractions are available in PeopleSoft CRM industry-specific applications.

Contact Methods and Status

Every interaction has an associated contact method. An interaction's contact method categorizes the interaction. It indicates the direction (inbound or outbound) of the interaction and the communication channel. Inbound interactions occur when a customer initiates the contact; outbound interactions occur when you initiate the contact. Outbound interactions can be manual (for example, when a salesperson sends correspondence to a customer) or automatic (for example, when workflow notifies a customer that a case is closed).

Many communication channels are used for both inbound and outbound communications. For example, phone, email, and paper correspondence (whether mailed or faxed) can originate internally or externally. However, the customer always initiates web-based interactions. Therefore, the Inbound Chat and Inbound Web (for web self-service) contact methods do not have any outbound counterparts.

The Interaction Detail page contains the contents of the interaction (the text of the email, correspondence, or chat), and the interaction detail type identifies that detail type. For example, the phone interaction detail type is just one type, whereas the contact methods include Phone In and Phone Out. Contact methods include both the channel and the direction of the interaction (in or out), while the interaction detail type is used mainly to control different sets of interaction statuses. There are different sets of interaction statuses for different channels and directions.

Contact Method (INTERACTION_MTHD) and **Interaction Detail Type** (RB_MCF_DETAIL_TYPE) are translate fields.

Interaction Status

Every interaction has a status, which varies depending on the contact method. This table shows the system delivered statuses for each contact method:

Contact Method	Statuses
Inbound Chat	*Accepted*, *Completed* and *Requested.* See "Understanding Chat" (PeopleSoft Multichannel Applications).
Inbound Email	*Assigned, Canceled, Completed, Processing, New,* and *Reassigned.* See "Understanding Email Management" (PeopleSoft Multichannel Applications).
Inbound Fax/Outbound Fax	None specified.
Inbound Phone/Outbound Phone	*Busy, Callback, Child Answered, Completed, In Progress, No Answer,* and *Do Not Call Again.* See Understanding the 360-Degree View.
Outbound Email/Outbound Worklist Notification Outbound Email includes email replies, manual notification (sent as email), and email that is sent through a correspondence request. Outbound Worklist Notification refers to manual notifications that are sent as worklist entries.	*Completed, Cancelled, Failed In Delivery,* and *In Progress.* See "Understanding Email Management" (PeopleSoft Multichannel Applications).
Outbound Print/Printer	*Completed, Cancelled, Failed In Delivery,* and *In Progress.*
Outbound SMS	*Completed, Cancelled, Failed In Delivery,* and *In Progress.*
Synchronized Email	*Completed.*
Self-Service/Inbound Web	*Completed.* See Understanding Customer Self-Service.

An interaction's initial status depends on how the interaction is created. You can manually update statuses for interactions that you create using the 360-Degree View feature, but the system maintains statuses for other types of interactions.

Interaction Creation

You can create interactions manually, or the system can create them automatically. This table lists the situations in which the system creates interactions:

Condition	Subinteraction	Contact Method and Status Management
A user accesses Customer or Worker 360-Degree View.	Created based on the user's actions in the 360-Degree View.	In the 360-Degree View, the user can see the contact method and can change it manually. The multichannel framework type is not user-selectable. In the 360-Degree View, the multichannel framework type is always *Phone*.
The PeopleSoft CRM Computer Telephony Interface (CTI) application uses a delivered CTI transaction to access a page in PeopleSoft CRM. **Note:** CTI transactions that you create do not automatically create interactions or subinteractions.	Created by the system if the transaction's target page is a subinteraction-enabled object.	Contact method: Phone Status default: *In Progress*
A user sends email or print correspondence using the PeopleSoft CRM correspondence management features.	Created for the object from which the correspondence was sent.	Contact method: Outbound mail Status default: *In Progress*
• A user sends manual notifications as email to internal (for example, workers) and external recipients (for example, customer contacts and consumers), or as worklist entries to internal recipients. • A user replies to an inbound email using Email Workspace (available if you license the PeopleSoft email response management system [ERMS]).	Interactions are created for the notifications. A subinteraction is created for the transaction with which each outbound email or worklist notification is associated.	Contact method: Outbound email Status default: *In Progress*
The PeopleSoft ERMS processes an inbound email.	The system creates an interaction for the inbound email. A subinteraction is created when a user manually associates related objects to the inbound email. If a newly received email is part of a thread, it automatically inherits its parent email's related objects and subinteractions.	Contact method: Inbound email Status default: *New*

Condition	Subinteraction	Contact Method and Status Management
The system sends an automated email to a customer or worker from the context of a help desk case to a worker. Automated email is sent by AAF workflow, by business project workflow, or by the ERMS system autoresponse process to structured email. **Note:** Auto -acknowledgement email sent by the ERMS system or in response to a customer's Contact Us submission does not create an interaction.	Interactions are created for AAF workflow notifications but not for business project workflow notifications. No subinteractions are created. A subinteraction is created by the ERMS autoresponse process if the subinteraction is associated with transactions.	Contact method: Outbound email Status default: *In Progress*
A self-service customer submits a Contact Us message. The Contact Us page is available only to external customers, not to workers.	The text of the message becomes the interaction note.	Contact method: Phone Status default: *In Progress*
A customer requests a chat session from the self-service Contact Us page.	None.	Contact method: Chat Status: *Requested*
A self-service user creates a new case or updates an existing case in PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources.	The case that was created or updated.	Contact method: Phone Status default: *In Progress*

To record communications that occur outside of the PeopleSoft CRM system, users can manually create interactions using the appropriate 360-Degree View. Users might manually create interactions if:

• A phone call is placed or received without the use of the CTI system.

• A letter or fax is received.

• Email is sent from outside of the PeopleSoft CRM system.

• Email is received by a mailbox that the ERMS system is not monitoring.

Interaction Display

There are various interfaces for viewing interaction information.

Interactions in the 360-Degree View Pages

PeopleSoft CRM provides 360-Degree View pages for customers and workers. There are two separate 360-Degree View pages for workers: one for PeopleSoft HelpDesk and one for HelpDesk for Human Resources. As delivered, all of the 360-Degree View pages are configured to show interactions in the dynamic grid that you create for it. You can configure a dynamic grid to display all of that interaction's subinteractions when it is expanded.

The 360-Degree View page for a customer shows all of the interactions for that customer.

Other Interaction Lists

In addition to the 360-Degree View pages, you can view lists of interactions using:

*   Interaction history grids within transactional components.

    The components that you use to manage subinteraction-enabled components (including Cases, Leads, and Orders) include a grid that shows all interactions for the specific transaction.

*   The Interaction List page.

    This page enables you to search for and access interactions directly from a menu (rather than from the context of a specific customer or transaction).

*   The Recent Interactions pagelet.

    This pagelet displays recent interactions for a selected customer. The Recent Interactions pagelet is available with PeopleSoft CRM Portal Pack.

Interaction Details

From any interaction list, you can drill into the Interaction page, where you can see the details of a specific interaction. The page that appears depends on the interaction type:

*   If the interaction was created on the 360-Degree View page, the details appear on the Interaction Detail page.

*   If a correspondence request created the interaction, the details appear on the Interactions - View Correspondence page.

*   If the interaction is an inbound email or outbound notification (that is, a worklist entry or email other than email sent through a correspondence request), drilling into the interaction displays the details on the Email Workspace component (for inbound email) or the Outbound Notification page (for outbound notification).

*   If the interaction is a chat session, the detail page shows the full chat transcript.

Related Links
PeopleSoft Portal Pack
Understanding the 360-Degree View

Modifying Interaction Status

This topic discusses how to modify interaction status descriptions.

Page Used to Set Up Interaction Status

Page Name	Definition Name	Usage
Interaction Status Page	RI_STATUS_SETUP	Modify interaction status descriptions.

Interaction Status Page

Use the Interaction Status page (RI_STATUS_SETUP) to modify interaction status descriptions.

Navigation:

Set Up CRM > **Common Definitions** > **Correspondence** > **Interaction Status Setup** > **Interaction Status**

This example illustrates the fields and controls on the Interaction Status page.

Warning! If you change interaction statuses, you must make appropriate code changes in PeopleSoft Application Designer.

Field or Control	Description
Status Code	Displays the statuses that PeopleSoft CRM delivers for the interaction detail type.

Viewing Interactions

This topic discusses how to view interactions.

Pages Used to View Interactions

Page Name	Definition Name	Usage
Interaction List Page	RI_INTERACT_HOME	Search for interactions.
Interactions Page	RI_INTERACTION	View interaction details, including a list of related subinteractions and the complete text of any interaction note.
Interactions - View Correspondence Page	RBC_RECPIENT_INQ	View interaction details for the correspondence request.
Inbound Email Page	RB_EM_IB	View interaction details of inbound email.
Outbound Email Page	RB_EM_OB	View interaction details of inbound email.
Chat Page	RB_CHAT_LOG	View interaction details of a chat.

Interaction List Page

Use the Interaction List page (RI_INTERACT_HOME) to search for interactions.

Navigation:

Customers CRM > Interaction List > Interaction List

This example illustrates the fields and controls on the Interaction List page.

Interaction List							
▶ Search							
Business Unit = APP01							
Interactions				Personalize | Find | 🗗 | 📊	First ◀ 1-59 of 59 ▶ Last		
Name	**Type**	**Contact Method**	**Interaction Status**	**Interaction Category**	**Start Date & Time**	**Comments**	
📄 Steve Collins	Order	Outbound Email	In Progress		10/04/2002 10:34AM	\ Multi-Channel Related Transaction\	
📄 Gavin Brent	Order	Outbound Email	In Progress		10/04/2002 4:27PM	\ Multi-Channel Related Transaction\	
📄 Gavin Brent	Order	Outbound Email	In Progress		10/04/2002 4:35PM	\ Multi-Channel Related Transaction\	
📄 Gavin Brent	Order	Outbound Email	In Progress		10/04/2002 4:38PM	\ Multi-Channel Related Transaction\	
📄 Gary Smart	Order	Outbound Email	In Progress		10/07/2002 4:06PM	\ Multi-Channel Related Transaction\	
📄 Kaley Parker	Order	Outbound Email	In Progress		10/07/2002 4:51PM	\ Multi-Channel Related Transaction\	
📄 Jason Taylor	Sales Lead		In Progress		10/21/2002 10:51AM	\ Added Sales Lead No. 1000300129\	
📄 Jack Pepper	Case		Completed		10/24/2002 9:05PM	\ Viewed/Updated Case No. 220334\	
📄 Jack Pepper	Case		Completed		10/24/2002 9:06PM	\ Viewed/Updated Case No. 220334\	
📄 Jack Pepper	Case		Completed		10/24/2002 9:08PM	\ Added Case No. 220362\	

Use this page to search for and view interactions by selected search criteria. You cannot add or modify interaction data on this page.

Search

Use this topic to define search criteria and perform searches. You can control the appearance and behavior of the interaction search by using the PeopleSoft CRM search configuration utility.

See "Understanding the Configurable Search" (Automation and Configuration Tools).

Note that not all search fields apply to all interaction types. For example, only interactions that are created from a 360-Degree View page have a value in the **Callback Date** field.

Field or Control	*Description*
Type	Select a subinteraction type. The search locates interactions that have the type of subinteraction that you select. Available values depend on which PeopleSoft CRM products you have licensed.

Interactions

This section displays search results and lists all subinteractions (shown in the Type column), along with their interactions.

Field or Control	Description
	Click the **Edit This Interaction** button to access the Interaction page and view detailed information about the interaction. A different interaction detail page appears for each type of interaction.
Type	Displays links to associated subinteractions. An interaction can have more than one link. The link text is the subinteraction type—for example, *Case* or *Order*.

Interactions Page

Use the Interactions page (RI_INTERACTION) to view interaction details, including a list of related subinteractions and the complete text of any interaction note.

Navigation:

• Click the **Edit This Interaction** button for an interaction that has no associated contact method on the Interaction List page.

• Click the **Edit This Interaction** button for an interaction that has no associated contact method on any 360-Degree View page.

• Click the **Edit This Interaction** button for an interaction that has no associated contact method on the Recent Interactions pagelet.

This example illustrates the fields and controls on the Interaction page.

```
Interaction

  Customer Information
                Contact    Jack Pepper
               Customer    Shoreview Medical

  Interaction Information
          Contact Method [                    ] [▼]
        Interaction Status [Completed          ] [▼]
             Start Date  10/24/2002  9:06PM
               End Date  10/24/2002  9:06PM
           Callback Date [              ] [31]   Time [      ]

    Interaction Category
        No Interaction Category

  Related Transactions        Personalize | Find | [⤢] | [▦]   First ◀ 1 of 1 ▶ Last
        Type              Start Date & Time    Comments
   [▤]  Case              10/24/2002  9:06PM   Viewed/Updated Case No. 220334

  Modified  10/24/2002  9:06PM PDT     SAMPLE

  Return to Interaction List
```

Customer Information

Field or Control	Description
Contact	Displays the name of the person (company contact, consumer, or worker) for whom you created the interaction.

Interaction Information

The fields in this group box are identical to the fields in the **Log Interaction** group box on the 360-Degree View page.

See Understanding the 360-Degree View.

Interaction Category

This section is applicable to interactions that are created for chat, phone, and email communications. It shows the category that was selected prior to closing the associated channel of communication.

For other interactions that are not associated with categories that are specific to multichannel communications, the *No Interaction Category* message is displayed.

See "Chat Session Categorization" (PeopleSoft Multichannel Applications), "History: Actions Taken Page" (PeopleSoft Multichannel Applications).

Related Transactions

This grid lists any subinteractions (including notes) that are associated with the interaction.

Note: Your internal business processes determine whether users enter notes in the interaction itself or in another transaction (such as a case or lead) that was the subject of the phone call.

Field or Control	Description
Type	Displays the type of subinteraction. Available values depend on which PeopleSoft CRM products you have licensed.
Start Date & Time	Displays the date and time that the subinteraction was created.
Comments	Displays the full text of the note if the type is *Note.* For other types of related transactions, this field is blank or it may contain comments such as *Added New Case* or *Multi-channel related transaction.*

Other Page Elements

Field or Control	Description
Return to 360-Degree View	Click this link to return to the 360-Degree View page. This link appears only if you originally accessed the Interaction page from the 360-Degree View page.
Return to Interaction List	Click this link to return to the Interaction List page. This link appears only if you originally accessed the Interaction page from the Interaction List page.

Interactions - View Correspondence Page

Use the Interactions - View Correspondence page (RBC_RECPIENT_INQ) to view interaction details for the correspondence request.

Navigation:

• Click the link for an interaction that represents correspondence on the Interaction List page.

• Click the link for an interaction that represents correspondence on any 360-Degree View page.

• Click the link for an interaction that represents correspondence on the Recent Interactions pagelet.

The fields on this page are identical to the similarly named fields in the Correspondence Request page.

Field or Control	Description
View Entire Correspondence	Click to view the correspondence detail in the Correspondence Request page.

See "Correspondence and Notifications" (Automation and Configuration Tools).

Chapter 18

Setting Up the 360-Degree View

Understanding 360-Degree View Setup

This topic provides an overview of 360-Degree views in PeopleSoft CRM and discusses:

- 360-degree view integrations.

- 360-degree view search pages.

- 360-degree view system data.

- 360-degree view setup process overview.

Related Links
Understanding Interactions
Understanding the 360-Degree View

360-Degree Views in PeopleSoft CRM

The PeopleSoft CRM 360-Degree View page enables you to manage actions and interactions for a business object—a customer or contact of customer , site or contact of site, or worker. The 360-degree view provides both an entry point for interactions with the business object and a central point from which to add and search for transactions, such as agreement, installed product, defect, quote, order, case, lead, opportunity, RMA (return material authorization) and service order.

More specifically, the 360-Degree View allows the agent to:

- Access related information concerning the business relationship with the customer or worker, such as a customer's installed products and the agreement associated with each one.

- Create a supported transaction.

    The agent can return to the 360-Degree View easily using the **History** field from the transaction.

- View the installed product hierarchy that pertains to the customer, contact, or worker.

- View and modify product registrations.

- Create a case or access a case from the context of the customer's or worker's related information, such as a particular installed product or even from the agreement associated with that product.

- Navigate to a new case page with one object in context; for example, to transfer to a new case from the context of a customer's installed product.

- Quickly perform an action without transferring to other objects, for example, creating a service order for an installed object in the background.

- Quickly verify and change first name, last name, email address, and phone number.

- View certain HR-specific information in the Job and Position Summary, Pay Summary and Benefits topics from the Human Resources Help Desk (HRHD) 360-Degree View.

See PeopleSoft Call Center Applications

The 360-Degree views that are available in PeopleSoft CRM are:

- Customer 360-Degree view.

- Worker 360-Degree view.

- Human Resources Help Desk (HRHD) 360-Degree view.

- Constituent 360-Degree view for Higher Education.

Role-specific data for a business object appears on the 360-degree view pages. The user can select a different business object role to have a different set of data appear, or search data based on date ranges that are specific to roles. Note that different 360-degree views exist for workers and customers: if an individual is both a worker and an individual consumer in your system, use the 360-degree view for the desired role to view that person's information. The worker role does not appear on the customer version and the consumer role does not appear on the worker version.

360-Degree View Trees

The 360-degree view pages represent, in tree format, the business activities between the organization (through an agent) and a customer or worker. You can build trees from the highest level of the hierarchy (root node) to the lowest level of the hierarchy. Tree terminology is derived from the concept of a family tree. The root node is the *parent,* and nodes that report to it are its *children.* Nodes that have the same parent are called *siblings.* These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time.

A tree node in the 360-Degree View tree has three parts: the node Button, the node name, and a node description. The name and description vary depending on the type of interaction. When defining the tree, you can specify an add, view all, and search node for a particular node of the tree.

This example illustrates the fields and controls on the Example, 360-Degree View activity tree.

In the sample data, PeopleSoft CRM delivers trees specific to these CRM applications:

• Support

• Field Service

• Sales

• Marketing

• Order Capture

• HelpDesk

• Higher Education (including versions for Support case, IT case, and Blended Case)

• Human Resources HelpDesk

Interactions

An interaction is the sum of the events that take place when a customer contacts you. It might consist of several subinteractions.

An interaction is created:

- When you click a node that is subinteraction-enabled in the 360-Degree View tree to view or change the existing transaction.

- When you perform a transaction that is subinteraction-enabled by clicking the **Go** button next to the **Actions** drop-down field on the 360-Degree View or by clicking a link in the dynamic grid.

- When you enter comments in the Note text box that appears in the **Log Interaction** page region and click the **Save** button on the 360-Degree View.

- When the 360-Degree View page appears through computer telephony integration, the system creates an interaction automatically for the phone conversation.

Subinteractions

A subinteraction is an event in an interaction.

You can configure the creation of subinteractions to meet business needs. Using the Configure Role page, you can specify whether or not to capture a transaction that you initiate from the 360-degree view as a subinteraction of a node. Note that by design, not all nodes and transactions can create subinteractions.

An interaction may contain multiple subinteractions. For example, a call with a customer may involve updating a case, adding a service order, and sending a note about the customer. All of these subinteractions are logged under the same interaction.

Interaction Nodes

This figure shows how interactions and subinteractions are represented in the 360-Degree View tree:

This example illustrates the fields and controls on the Interaction Node.

In this example, the interaction details appear in the Dynamic grid.

Actions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform actions on behalf of the customer, worker, or company. The actions that you can perform appear in the Actions drop-down list on the upper right corner of the 360-Degree View page and in a similar drop-down list below the dynamic grid to the right of the Activities tree.

Actions that you can perform in the 360-Degree View include adding a case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, installed product and installed bundle. You can modify this set of actions using PeopleSoft CRM setup pages.

You can also perform actions on these objects from the 360-Degree View while passing on related information, or *context*. Examples of context-endowed actions are the creation of a new case for the customer's installed product. The product would be listed in the Activities tree.

Action Categories

The action category specifies the method that performs the action that it is associated with. Because the action category is based on a method, it enables the action to pass contextual information while performing the action. Not only can you associate business unit and setID to the action performed, you can also pass the contents of a data record. This additional context enables you to carry product-related data forward into the underlying transaction required to serve the customer or worker. For example, you might configure an Add Case action category that identifies a customer's installed product and agreement on the new case.

The action category also defines the structure of confirmation information returned by the action that does not transfer to other components for performing the actions.

Setup involves:

- Specifying whether the action category is based on Business Unit, SetID or neither.

- Designating a record that returns the additional context, such as set control value or a Quick Code, which can be passed to the method.

- Specifying a component name and the market for Display Template. This information is useful for Actions that use Display Template.

- Defining the contents of a Confirmation message for those actions that are performed in the background.

Dynamic Grid

The Dynamic grid displays details of a transaction that the agent selects in the Activities tree. It is located to the right of the Activities tree. The information displayed in the grid is configurable. You can also associate actions with the Dynamic grid, which appear in a drop-down list below it. To initiate an action, the agent selects the desired row on the grid and then selects the desired action from the drop-down list.

You can configure the Dynamic grid to display a secondary level.

Details displayed on the secondary grid are related to one of the primary grid objects. For example, you may want to display the cases entered against an installed product.

The 360-Degree View also lets you configure actions that can be performed on an object from the primary grid, enabling the agent to, for example, select an Installed Product and an Agreement and create a new case referencing these objects.

Note: For performance reasons, a maximum of 100 entries will be retrieved for display in the Dynamic Grid (even if more than that number of entries exist for the corresponding node selected from the Activities tree).

360-Degree View Integrations

360-Degree Views provide integration through EIPs to PeopleSoft Supply Chain Management (SCM) Financials, Campus Solutions, and Human Capital Management (HCM), as well as to Oracle E-Business Human Capital Management (E-Business HCM). Because E-Business HCM must run on an Oracle database, integration to this application is only available when your application utilizes an Oracle database.

When you define tree nodes, you can specify enterprise integration points (EIPs) that return data from other PeopleSoft or third-party systems. This gives you the flexibility to include any type of information in the system in the 360-Degree View tree. EIPs are predefined; use them to request information from, for example, PeopleSoft SCM Financials for invoice and payment information that is associated with a customer.

You can click a receivables transaction to view the detail in PeopleSoft SCM Financials.

Note: You must enable single sign on before you can transfer from PeopleSoft CRM to PeopleSoft SCM Financials or HCM, or to E-Business HCM.

See *PeopleTools: Security Administration* product documentation.

360-Degree View System Data

PeopleSoft CRM delivers predefined data for the 360-Degree View; including nodes, grid definitions, action categories, and transaction groups that are associated with nodes. You can set up 360-degree view trees that use this predefined system data. You set up additional information only if you need to change defaults. Actions are provided as sample data.

360-Degree View Setup Process

When you install PeopleSoft CRM, most of the necessary information is in place for you to set up the 360-degree view tree. PeopleSoft CRM delivers predefined data for the 360-degree view; including nodes, action categories, transaction groups that are associated with nodes, and grid definitions. You can set up 360-degree view trees that use this predefined system data. Set up additional information only if you need to change defaults.

To examine the predefined data, access the page where you set up that data by following the link in each step in the process below and search with no search criteria entered. The system displays a list of the predefined data that you can browse.

The general process for setting up the 360-Degree View is as follows:

1. Determine the actions that you want to be available from the 360-Degree View and whether you want them to pass context data when they are executed.

   If so, use the Action Category page to create a category that passes the data from the appropriate records. Then use the Action Definition page to associate the action with an Action Category.

   See Configuring Actions and Transactions for the 360-Degree View.

2. Use the Transaction Group page to select the transactions that appear on the 360-Degree View, depending on the customer's role.

   When configuring a role for the 360-Degree View, you specify which transaction group should apply to that role.

   See Transaction Group Page.

3. Use the Dynamic Grid page to define a dynamic grid that lists important information from the transactions that are associated with each activity node.

   Optionally, associate an action to the grid. This will cause the display of an Action drop-down list for creating transactions associated with objects in the dynamic grid.

   See Dynamic Grid Page.

4. Use the Define Node page to define tree nodes that you can use to configure the 360-Degree View tree. Associate a dynamic grid with the node.

   When defining nodes, specify the node action and the type of node—placeholder, view, application class, or EIP.

   See Define Node Page.

5. Use the Set Up Tree page to set up the 360-Degree View tree.

When setting up the tree, you specify the tree structure, the images that appear in the tree, its size on the page, and what transaction should appear for each node on it.

See Set Up Tree Page.

6. Use the Set Up Profile page to set up the Profile group box that appears on the 360-Degree View.

When setting up the profile, you can define the fields and buttons (as well as the buttons' actions) that appear in the Profile group box.

See Set Up Profile Page.

7. Use the Configure Role page to configure a PeopleTools role that is used to access the 360-Degree View.

When configuring a role, specify the tree, transaction group, and profile that you want to associate with this role. Plus, determine whether you want to capture subinteractions for the transactions that are associated with the transaction group and the nodes in the tree.

See Configure Role Page.

8. (Optional) If you are implementing the PeopleSoft CRM Government applications, use the User Links page to define user links that appear on the search page that accesses the 360-Degree View.

See User Links Page.

9. Use the 360 Degree Search Preferences - 360 Degree View Search Preferences page to specify the search page that you want to use to access the 360-Degree View.

See Search Preferences Page.

Configuring Actions and Transactions for the 360-Degree View

To configure transactions for the 360-degree view, use the Define Action (RB_TD_ACT_DFN), Define Action Category (RB_TD_ACT_CAT) and Define Transaction Group (RB_TD_TRANS_SETUP) components.

This topic provides an overview of transactions in the 360-Degree View.

Pages Used to Configure Actions and Transactions for the 360-Degree View

Page Name	Definition Name	Usage
Action Category Page	RB_TD_ACT_CAT	Create an action category for populating the Action drop down list.
Action Definition Page	RB_TD_ACT_DFN	Assign actions to Action Categories.

Page Name	Definition Name	Usage
Related Dynamic Grid Page	RB_TD_DYNGRD_SUM	View the dynamic grids with which an action is associated.
Related Transaction Group Page	RB_TD_ACT_DFN	View the related group grids with which an action is associated.
Transaction Group Page	RB_TD_TRANS_SETUP	Set up transaction groups and assign actions to them.
Copy Transaction Group As Page	RB_TD_TRANS_CLONE	Clone an existing transaction group. Cloning an existing transaction group makes a copy of it.

Understanding Actions and Transactions

The 360-Degree View page that PeopleSoft delivers enables you to view or perform transactions on behalf of the customer or company. The transactions that you can perform appear in the Action drop-down box on the upper right corner of the 360-Degree View page.

When you create a transaction, you also create an object in the system. Transactions that you can create in the 360-Degree View include case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, and installed product. You can modify this set of transactions by using PeopleSoft CRM setup pages.

Actions are the tasks that create the transactions. You must associate actions to a Transaction Group when configuring a transaction.

Action Category Page

Use the Action Category page (RB_TD_ACT_CAT) to create an action category for populating the Action drop down list.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Action Category** > **Action Category**

This example illustrates the fields and controls on the Action Category page (1 of 3).

This example illustrates the fields and controls on the Action Category page (2 of 3).

This example illustrates the fields and controls on the Action Category page (3 of 3).

Action Category

This section defines the method that will be invoked by the actions that are associated with this Action Category. It can be a Component transfer or a Portal reference or an Application Class. Action Category that requires additional context to be passed must always have an Application Class. For example, passing Quick Codes in addition to Display Template information for creating a Case.

Field or Control	Description
Status	Defines the Action Category status; either *Active* or *Inactive*. Only action categories that are active appear in the Action drop down.
Subinteraction	Select a subinteraction to correspond to the Action Category. The subinteraction appears on the Subinteraction list of the associated interaction, if any.

Transfer Type

Field or Control	Description
Transfer	Select to transfer to another PeopleSoft CRM component and page. If you select **Transfer**, use the **Component Navigation** and **Component Market** fields to select the transaction to transfer to.
Transfer Mode	Select the mode in which to open this page for the transaction. Values are *Add*, *Correction*, and *Update/Display*.
Market	Select the desired market associated with the component to which the system transfers. A component is uniquely identified by its name and its market association. You can add records for each market.
Navigation	Select the Navigation Path to the desired component page. See "Defining Component Transfer Navigation" (Business Object Management).
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page.

Field or Control	Description
Application Class	Select **Application Class** to specify a PeopleCode application class to control the transfer. You can click the Package Tree Viewer link to search for application classes. See "Understanding Application Classes and Packages" (Automation and Configuration Tools).

Options

Use the Options fields to specify data retrieval information and additional context for the category's actions as well as display options. The Display Template fields determine the display template for the component that the action transfers to (if applicable).

Field or Control	Description
Set Control Option	Select *Business Unit, Set ID* or *None* to specify the basis for tableset sharing for the action category. The default value is *None*. This is a required field.
Category Record	Select the category record that returns the additional context to be passed to the method, such as the set control value or Quick Code.
Set Control Field	Select the name of the set control field that appears in the Category Record. Available fields are determined by the Category Record selected.
Category Field	Select the category identifier field to appear in the Category Record. Available fields are determined by the Category Record selected.
Description Field	Select the description field that displays the desired text description of the action category when it is presented for selection during setup tasks. Available fields are determined by the category record selected.
Display Template	If the action requires a display template, select a component or a market, or a component *and* a market, to determine the display template to be used by the action.

Confirmation Details

Some actions transfer the system to another component. This would be typical if the user selected the Add Service Order action that requires further data entry on the Service Order page before it can be submitted. It is evident that the action was completed successfully when the 360-Degree View is replaced by the page of the component used in the action. Use the fields in the Confirmation Details group to specify how the system responds when an action that does *not* transfer the user to another component is completed.

In a confirmation, you can specify:

* Text message

  The text message is shown in the figure as the single line, "Case was successfully created."

* Action details

  Action details are the information that appears in the white panel. They are the fields defined in the Category Record. In the figure, this is the Case Number, Problem Summary, and Status fields. You can specify up to three fields.

The links are the bottom of the confirmation are not configurable.

In the page examples in this topic, in which the action creates a case in the background using Quick Code, the confirmation includes a text message, the case number and summary, and a link to the case. Note that the **Transfer** option is not selected, as transfer is defined by the Quick Code.

Note: Before you can configure a confirmation, there must be a record in the database for storing the transaction's runtime information (the Detail Record). Records are created in Application Designer.

See *PeopleTools: Application Designer Developer's Guide* product documentation.

Field or Control	Description
Catalog Number and **Message Number**	Select the Catalog Number and Message number to display the desired text on the confirmation message.
Detail Record	Select the record that defines the structure of the confirmation message. You can display a maximum of three fields.

Key Fields

Specify search criteria for retrieving data from the Category Record. Define additional keys using the Add mode.

Field or Control	Description
Field Name	Select the name of a key field from those available for the Category Record.

Field or Control	Description
Sequence	Specify the order of the key field in the search sequence.

Display Fields

Use Display Fields options to specify the fields containing the information in the Detail Record that you want to appear on the confirmation.

Field or Control	Description
Field Name	Select the name of the field whose values you want to appear in the confirmation detail (white panel). Available fields are determined by the Detail Record selected.

Display Type	Select one of the following to indicate how the field name value is to be displayed on the confirmation:
	
	• *Hyperlink*
	
	   Select *Hyperlink* to enable the user to initiate the transfer by clicking on the field value text.
	
	• *Long Translate*
	
	   Not supported. This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table.
	
	• *Others*
	
	   Select this option to display the value as a read-only.
	
	• *PushButton*
	
	   Not supported. Select to make this field appear as a button that initiates the transfer.
	
	• *Related Display*
	
	   Not supported. This option is for display of a custom element.
	
	• *Short Translate*
	
	   Not supported. This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.

Field or Control	Description
Field Label ID	If you want the field to be displayed by its label, select *Field Label ID*.
Label Type	If you selected Field Label ID, specify whether to display the Long Name or Short Name for the field label.
Sequence	Enter *1*, *2*, or *3* to indicate the position of the text field in relation to the other text fields.
Description	The text description specified for the Display Field. It is not editable here.

Field Change Event

This section appears if you select *Hyperlink* as the Display Type.

Field or Control	Description
Transfer	Select to transfer to another PeopleSoft CRM component and page.
Navigation	Select the navigation path to the desired component page. See "Defining Component Transfer Navigation" (Business Object Management).
Market	Select the desired market associated with the component being transferred to. A component is uniquely identified by its name and its market association. You can add records for each market.
Action	Select the mode in which to open the component page being transferred to. Values are *Add*, *Correction*, and *Update/ Display*.
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select **Portal Content Reference**, use the **Portal Name** and **Portal Object Name** fields to select the destination portal page.

Field or Control	Description
Application Class	Select to launch an application class that controls the transfer. You can click the Package Tree Viewer link to search for application classes.
Copy	Click to clone the Action Category. Any changes you made to the original action category are then saved, and the Copy Action Category page appears. The page contains a prompt for a new action category ID. Clicking the **OK** button creates the cloned action category and gives it the name of the original Action Category with the prefix *Copy of.*

Action Definition Page

Use the Action Definition page (RB_TD_ACT_DFN) to assign actions to Action Categories.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Action** > **Action Definition**

This example illustrates the fields and controls on the Action Definition page.

Field or Control	Description
Action Name	Enter the name that you want to appear in the **Actions** drop down list.

Field or Control	Description
Action Category	Select an action category to associate the action with. You must associate an action with an action category so that it appears on the **Actions** drop down list.
Display Template ID	Select a display template to be used for the action. This field is hidden if the component for display template is not defined in the action category.
Set Control Value	Select a set control value. This field is hidden if the **Set Control** option in the **Action Category** field is set to *None*.
Category Value	Select a category value. Available category values are determined by the selected set control value.

Related Dynamic Grid Page

Use the Related Dynamic Grid page (RB_TD_DYNGRD_SUM) to view the dynamic grids with which an action is associated.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Action** > **Related Dynamic Grid**

Dynamic Grid Page

Related Transaction Group Page

Use the Related Transaction Group page (RB_TD_ACT_DFN) to view the transaction grids with which an action is associated.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Action** > **Related Transaction Group**

Transaction Group Page

Transaction Group Page

Use the Transaction Group page (RB_TD_TRANS_SETUP) to set up transaction groups and assign actions to them.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Transaction Group** > **Transaction Group**

This example illustrates the fields and controls on the Transaction Group page.

Field or Control	Description
Transaction Name (transaction group name)	The transaction group is the set of transactions that is available in the 360-Degree View.

Related Actions

Field or Control	Description
Order	Specifies the order in which the Actions will be displayed in the drop-down.

Field or Control	Description
Action Name	Select an action from the list of those that are available.
	You can insert a *separator* action to indicate actions that do not transfer the agent to another page. At run time, the separator action appears as a dotted line in the drop down list. For example, the system supplies a separator action in the Support Transaction Group. The sample action Add Case - Contact Updated will be added below this separator action.
	Note the dotted line entry {− − − − − − − }. This is not an action but a text separator for the run time drop down list. As delivered, the separator divides the actions that transfer the agent to another component—the first group of actions—from those that don't. If you want to preserve this distinction, place new actions above or below the separator as appropriate. You can't delete the separator, and at run time, the user can't select it.

Field or Control	Description
Disable for Inactive BO	Select to disable actions for business objects that are specified as *Inactive* on the page. A worker who is no longer employed is an example of an inactive object.

Field or Control	Description
Default	Specifies the default actions for the drop-down.

Field or Control	Description
Status	Specifies whether the action is *Active* or *Inactive*. The default is *Active*. Only active actions are displayed in the drop-down list box.

Field or Control	Description
Add Action	Click to append a new action row to the list of related actions.

Setting Up the 360-Degree View Tree

To set up the 360-Degree View Tree, use the Define Node (RB_TD_NODE), Set Up Tree (RB_TD_TREE_DEFN), and Define Dynamic Grid (RB_TD_DYNGRD) components.

This topic lists prerequisites and discusses how to set up the 360–degree view tree.

Pages Used to Set Up the 360-Degree View Tree

Page Name	*Definition Name*	*Usage*
Define Node Page	RB_TD_NODE	Define nodes that you can use to configure the 360-Degree View Tree.
Related Trees Page	RB_TD_NDE_RELTOTRE	View and access tree names that are related to the 360-Degree View node.
Dynamic Grid Page	RB_TD_DYNGRD_PG	Define search criteria to associate to a node and component transfers for the grid.
Application Packages Lookup Page	RB_APPLPKG_PG1	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Set Up Tree Page	RB_TD_TREE_DEFN	Define the tree configuration (images that appear in the tree, image size, page size, and date filter).
Tree Node Page	RD_TD_TREE_NDE	Define the parent and child relationship of the tree nodes.
Test Your Tree Page	RB_TD_TREE_TEST	Test the 360-Degree View tree to ensure that you configured it correctly.
Copy Tree As Page	RB_TD_TREE_CLONE	Copy an existing tree.

Define Node Page

Use the Define Node page (RB_TD_NODE) to define nodes that you can use to configure the 360-Degree View Tree.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Node** > **Define Node**

This example illustrates the fields and controls on the Define Node page (1 of 3).

This example illustrates the fields and controls on the Define Node page (2 of 3).

This example illustrates the fields and controls on the Define Node page (3 of 3).

Field or Control	Description
SubInteraction	Select a subinteraction that corresponds to the transaction that is associated with the tree node.
Root Node	Select if the node that you are defining is the root node.

Node Action

For each tree node, specify the node action. Node actions are:

Field or Control	Description
Transfer	Transfers the user to a PeopleSoft CRM component and page that you define. If you select *Transfer*, use the **Navigation, Market,** and **Action Mode** fields to select where you want the transaction to transfer. Define the transfer fields using the Component Navigation component. See "Defining Component Transfer Navigation" (Business Object Management).

Field or Control	Description
Market	Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market, thus adding context to the node information.
Action Mode	Select the mode in which to open this page for the transaction. Values are *Add, Correction, Update,* and *Update/Display All.*
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select **Portal Content Reference,** use the **Portal Name** and **Portal Object Name** fields to select the portal page to which you want to transfer.
Application Class	Select to call a PeopleSoft CRM application class. If you select Application Class, use the **Class ID, Class Path,** and **Method Name** fields to enter the application class that you want the system to call.
Package Tree Viewer	Click to search for and view the available application packages that PeopleSoft CRM provides. When you click this link, the Application Packages Lookup page appears. The information that you select on this page appears on the Define Node page after you click **OK.**
Dynamic Grid	Click to associate a dynamic grid to the node.
Grid ID and **Related Grid ID**	Defines the name of the primary grid and its related secondary grid. Prompts display the available Dynamic grids. If you have specified a Related Grid, you must select values in the fields under the No Context Selected Message, No Related Rows Found Message, and Search Fields for Related Grid sections.
No Context Selected Message	Select a message to display in the secondary grid when no rows are selected from the Dynamic grid.
No Related Rows Found Message	Select a message to display in the secondary grid when no rows are found for the selected row in the Dynamic grid. Select a message from the Message Catalog.

Field or Control	Description
Search Fields for Related Grid	Click the **Add Search Field** button to create a grid list of the search fields that are common to the primary and secondary grids that must be used to retrieve data in secondary grid. You must specify these fields if you have a related grid.
None	Indicates that no action is associated with the node.

Node Type

The fields in this section enable you to define the node type.

Field or Control	Description
Placeholder and **Placeholder Type**	Select to indicate that this node is represented as a placeholder on the 360-Degree View tree. Specify the placeholder type. Values are: • **Add Node** Select to have the tree node represent an add node. • **Folder** Select to indicate that the tree node is a placeholder that is represented by a folder. • **Search Node** Select to have the tree node represent a search node. • **View All** Select to have the tree node represent a view all node. This applies only to the dynamic grid action on the node.
Disable for Inactive BO (disable for inactive business object)	Select to prevent the action from being performed on business objects that are inactive.
View	Select to define the information that appears in this node, then provide values for the following fields.
View Name	Enter the view name that is associated with this node.

Field or Control	Description
Key Field 1 and **Key Field 2**	Enter key fields for the view. **Note:** These fields must appear as the first part of the key structure: RB_TD_360_SBR. Additionally, the view should include the RB_TD_360P_SBR and RB_AUDIT_SBR subrecords in any order.
Fields to Display	Indicate the fields that appear and the order in which the fields appear. When appearing under the node of the 360-Degree View tree, view information is divided into two sections. The first section can contain 20 characters, and the second can contain 30 characters. Specify which fields you want to appear in which sections, and in what order. Also, you can specify how the information is sorted. The two sections are separated by a hyphen. If two or more fields appear in one section, those field values are separated by a colon. For example, under an Orders node, you might see this information coming from a view: 2002-09-20 - Pending:d0e5061fcc. In this case, the capture date is defined for the first section, and the status code and capture ID is defined for the second section.
Sequence	Enter a number in sequence. This number defines the order in which the fields appear in the different sections for the node.
Display	Select to have this field appear for the node on the customer 360-Degree View tree.
Display In	Select the section in which to display this field. Values are *First, Second,* and *No Display.*
Display Length	Enter the length of the field.
Display Value	Select the value that appears for this field. Values are: *Long Translate, Related Display, Short Translate,* and *Value.* If you select *Related Display,* use the Use SetID, Record Name, and Column Name fields on the Related Field Details tab to select the related field details. One of the fields of the record entered should include the selected field in the node view. If the value selected is based on setID, the node view should have a key field 2 of *SETID* or *BUSINESS_UNIT.*

Field or Control	Description
Order By Details	Select for the fields by which you want to sort the information. Then use the Order Sequence field to select how you want to sort the information. Values are *Ascending* and *Descending.*
EIP - (Synchronous)	Select to indicate that the information that appears in this node is gathered from a PeopleSoft EIP. If you select this option, you must specify the EIP information and define how the information is to appear on the 360-Degree View tree.
Class ID, Class Path, and Method Name	Enter the application class information for this EIP. The method that your assign here is used to create the request message and populate the node with the requested information.
Request Message	Enter the application request message for this EIP.
Response Message, Key Field 1, and Key Field 2	Enter the response application message for the EIP and its keys.
PeopleCode	Select to indicate that the information that appears in this node is gathered from executing PeopleCode If you select this option, you must specify the application class ID and method name.
Class ID, Class Path Like, and **Method Name**	Enter the application class information for the PeopleCode class.
Record Name	Enter the record name that contains the data.
Key Field 1 and **Key Field 2**	Enter the key fields for the record name.
Fields to Display	The group boxes for EIPs and PeopleCode is the same as the **Fields to Display** group box for Views. Use these fields to control how the information appears under the node of the 360-Degree View tree that is associated with an EIP.

Related Trees Page

Use the Related Trees page (RB_TD_NDE_RELTOTRE) to view and access tree names that are related to the 360-Degree View node.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Node** > **Related Trees**

This example illustrates the fields and controls on the Related Trees page.

Use this page to view and access the trees that are related to the node being set up for the 360-Degree View. Click the link under the **Tree Name** field to access the Set Up Tree page.

Set Up Tree Page

Use the Set Up Tree page (RB_TD_TREE_DEFN) to define the tree configuration (images that appear in the tree, image size, page size, and date filter).

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Set Up Tree** > **Set Up Tree**

This example illustrates the fields and controls on the Set Up Tree page.

Field or Control	Description
Market	Select the market with which to associate the tree.
Default Tree	Select to make this tree the default tree for the market selected above on the 360-Degree View. Select this check box to make this tree the default tree for the market selected above. This tree will then appear on the 360-Degree Views that are associated with this market. If you do not make this tree the default, the user might not be able to see any tree in the Activities section.

Tree Configuration

Field or Control	Description
Expanded Image, Leaf Image Name, End Node Image, and Collapsed Image	Enter the images that appear on the tree. The image appears in the Image Preview half of the group box. Default leaf image of the node is blank.
Image Height and **Image Width**	Enter the size of the image that appears on the tree. The default size is 16 by 16.
Display Levels	Enter the number of levels up to which the 360-Degree View tree is configurable.
Page Size	Enter the page size for the 360-Degree View tree. This is the size of the HTML area where the 360-Degree View tree appears on the 360-Degree View.

Field or Control	Description
Date Filter	Select the filter for the tree. Values are: • *1 - Today* • *2 - Yesterday* • *3 - Last Week* • *4 - Last 2 Weeks* • *5 - Last Month* • *6 - Last Year* • *7 - View All* --- **Note:** All date filters include the values for today. For example, select *2 - Yesterday* to show information that is related to today and yesterday. ---
Max. Date Filter (maximum date filter)	Select the maximum date filter, which is used as a restriction against the date field that the user actually enters. The system always looks at this filter when determining the information that appears on the 360-Degree View tree, regardless of what the user specifies in their date personalization settings. If this filter is not set, and if you select View All in the date personalization on the 360-Degree View, and if you select Enable Filtering on Date Range, then the system populates the start date with 01/01/1900 on the 360-Degree View.
Filter Dates By	Select either *Creation Date* to filter dates by the entity's creation date or *Last Modified Date* to filter dates by the entity's last modification date.
Callback Interaction	Select how the system should set the status of an interaction when a user clicks the **Finish Interaction** button. Values are *Set Status to Complete* and *Do not Set Status to Complete*
Footnote Icon	Select an alternate symbol to indicate a footnote in the 360-Degree View. The system defaults this field to the *dagger* symbol. As an alternative symbol, you can select two asterisks (**). The footnote itself appears next to a node and indicates that the date filter is not applied to the node data.

Tree Node Page

Use the Tree Node page (RD_TD_TREE_NDE) to define the parent and child relationship of the tree nodes.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Set Up Tree** > **Tree Node**

This example illustrates the fields and controls on the Tree Node page.

Field or Control	Description
Tree Node	Select the child node for the 360-Degree View tree.
Parent Node	Select the parent node under which this child node appears in the 360-Degree View tree.
Status	Select the tree node's status, either *Active* or *Inactive.* Only active nodes appear on the tree.
Sequence	Enter the order in which the child nodes appear on the tree. The sequencing is from low to high.

Node Parameters

Field or Control	Description
Leaf Image	Select the image for the leaf. The image appears next to the field. If you leave this field blank, the system uses the default tree leaf image.

Field or Control	Description
Display and **Fetch**	Enter the maximum number of rows that initially appear under the expanded node in the 360-Degree View Tree located in the Activities section of the page. Then enter the maximum number of rows to fetch, or retrieve, from the database and to display under the node when the user clicks *View All* on that tree node. The **Display** option is only valid for the *View* and *EIP* node types. If the field is blank for either of these node types, the system uses a default value of 5. Values in this field are ignored for other node types. The **Fetch** option is only valid for the *View* and *Peoplecode* node types. If the field is blank for either of these node types, the system uses a default value of 1000. Values in this field are ignored for other node types. **Note:** The **Display** and **Fetch** options do not apply to the *Dynamic Grid* node action, and they do not influence or control the number of rows generated in the dynamic grid.
Display Folder as	Select whether you want the node to appear as a folder or a leaf.
Expand	Select to expand the nodes on the tree when the tree initially appears on the 360-Degree View.
Hide Node if No Children	Select to hide the node if there are no values. For example, if the customer has no cases, the Case node does not appear on the tree.
Apply Date Filter	Select to apply a date range to the activities for the given node. This is selected by default. If cleared, the date range criteria does not apply to that node.

Test Your Tree Page

Use the Test Your Tree page (RB_TD_TREE_TEST) to test the 360-Degree View tree to ensure that you configured it correctly.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Set Up Tree** > **Test Your Tree**

This example illustrates the fields and controls on the Test Your Tree page.

To test a tree:

1. Enter data into one or more of the fields in the **Test Tree** page region.

2. Click the **Test Tree** button.

   The system verifies the tree configuration and a preview of the tree appears in the Activities group box.

Application Packages Lookup Page

Use the Application Packages Lookup page (RB_APPLPKG_PG1) to search for and view the available application packages or classes that PeopleSoft CRM provides.

Navigation:

Click the **Package Tree Viewer** link on the Define Node page.

This example illustrates the fields and controls on the Application Packages Lookup page.

Click any tree node to select the application class, then click **OK.** The system returns the information to the page from which you transferred.

Filters For Lookup

Select either **Class** or **Class Path** in the **Search By** field and enter either an application class ID or application class path.

Application Class Tree

The tree for the application class appears in this portion of the page.

Related Links

"Understanding Application Classes and Packages" (Automation and Configuration Tools)

Configuring the 360-Degree View

To configure the 360–Degree View, use the Set Up Profile (RB_TD_PROF_SET) and Configure Role (RB_TD_ROLE_TREE) components.

This topic discusses how to configure the 360–Degree View.

Pages Used to Configure the 360-Degree View

Page Name	Definition Name	Usage
Set Up Profile Page	RB_TD_PROF_SETUP	Define a profile that appears on the 360-Degree View.
Configure Role Page	RB_TD_ROLE_TREE	Configure tree information for a role.
Transaction Sub-Interactions Page	RB_TD_SUB_TRANS	Define the transactions for which to capture subinteractions.
Node Sub-Interactions Page	RB_TD_SUB_NODE	Define the nodes for which to capture subinteractions.
Dynamic Grid Page	RB_TD_DYNGRD_PG	Define the grid on which transaction information appears.
Action Category Page	RB_TD_ACT_CAT	Define categories in which to group actions to display on the Action drop down.
Related Actions Page	RB_TD_DYNGRD_ACT	Relate actions to dynamic grids.

Set Up Profile Page

Use the Set Up Profile page (RB_TD_PROF_SETUP) to define a profile that appears on the 360-Degree View.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Set Up Profile** > **Set Up Profile**

This example illustrates the fields and controls on the Set Up Profile page (1 of 2).

This example illustrates the fields and controls on the Set Up Profile page (2 of 2).

Field or Control	Description
Column Layout	Select the column layout for profile display.
Profile Type	Select *Customer Profile, Financial Profile,* or *Other.* This field controls the information that is available for inclusion in profile data.

Application Class Path

Field or Control	Description
Package Tree Viewer	Click to search for and view all of the application packages that PeopleSoft CRM provides. See Application Packages Lookup Page.

Description

Field or Control	Description
Market	Specify the market with which to associate this profile. A component is uniquely identified by its name and its market association.
Default	Select to set this profile as the default profile for this market.

Profile Fields to Display

Use the Add icon (+) to define multiple fields for the profile section.

Field or Control	Description
Record and **Field Name**	Enter the record and field name that you want to appear in the 360-Degree View Profile group box.

Field or Control	Description
Editable	Select the Editable check box to allow an agent to update the field's value.
	Note: In this release, you can apply the Editable feature only to these fields: FIRST_NAME, LAST_NAME, EMAIL_ADDR, ADDRESS_PHONE, and EXTENSION. Also, profile fields for PeopleSoft HelpDesk for Human Resources are not editable because the profile information resides in the HR database.
Label ID	Enter the label ID for this field in the Profile group box.
Label Type	Select whether you want the *Long Name* or *Short Name* to appear for this field in the Profile group box.
Method Name	Enter the name of the method that fetches the data from the record that you have specified. This method comes from the application class defined Application class path section.
Display Row	Enter a number to indicate the fields horizontal placement in the Profile group box relative to the other fields. Be sure that you take into account the number of Display columns when you plan the layout of the fields in the Profile group box.
Display Column	Select *First Column* (left side) or *Second Column* (right side) to indicate the field's vertical placement.
	Note: If you want to move the **Address** field from the default first column to the second column, additional code change is required.

First Button Details and Second Button Details

Use the fields in these sections to define the buttons in the 360-Degree View Profile group box. You can use these two to add any drill down actions like transferring to a transaction or opening a 360-Degree View page for the parent business object.

You can specify one, two, or no buttons. If there are any editable fields in the profile, the system automatically displays the **Apply Changes** button.

Field or Control	Description
Class ID, Class Path, and Method Name	Enter information to locate and identify the method that is executed when a user clicks the first or second button in the 360-Degree View row.
Image Name	Select a button image from the lookup list.
Display Image	Select to enable the button's display.
Image Tool Tip	Select an appropriate label for the popup tool tip.

Configure Role Page

Use the Configure Role page (RB_TD_ROLE_TREE) to configure tree information for a role.

Navigation:

Set Up CRM > Common Definitions > 360-Degree View > Configure Role > Configure Role

This example illustrates the fields and controls on the Configure Role page.

Field or Control	*Description*
Role Name	Select a PeopleTools role.
Transaction Name	Select the transaction group that you want to associate with this PeopleTools role. See Transaction Group Page.
Tree Name	Enter the tree that you want to associate with this PeopleTools role. See Set Up Tree Page.
Profile	Enter the profile that you want to associate with this PeopleTools role. These profiles are available as system data: • CORE (Core Profile). • EBSHR (HR Help Desk Profile for E-Business HCM). • HE (Higher Education Profile). • HRHD (HR Help Desk Profile). • WRKER (Worker profiles). See Set Up Profile Page.
Sequence Number	Enter a number that the system uses to determine which role information appears by default on the 360-Degree View when the user has more than one role in the system. For example, if a user has the PeopleSoft User role with sequence number 20 and the Support Manager role with sequence number 10, then the information that is related to the Support Manager role is used to initially populate the 360-Degree View because it has the lowest sequence number. The user can change the role that appears. See Configure Role Page.

Field or Control	Description
View Type	Select the type of view for this role. Values are: • *Constituent* • *Customer* • *HR HelpDesk Worker* • *Worker* If the **View Type** is *Constituent* or *HR HelpDesk Worker*, the **360-Degree View Section** grid is displayed listing all the possible extra sections that can appear on the 360-Degree View page: select the corresponding **Enabled** check box for each section that should be displayed for that role. The system uses the view type to determine the role and related information that appears in the 360-Degree View. If the view type has any of the above values, the system selects only the role with the specified view type having the lowest sequence number. For example, a user has the PeopleSoft User (sequence number 10, view type of Customer), HR HelpDesk Agent (sequence number 20, view type of HR HelpDesk Worker), Support Admin (support administration; sequence number 25, view type of Customer), and IT HelpDesk Agent (sequence number 30, view type of Worker) roles. When launching the 360-Degree View from Case, if the view type is *Worker*, then the system selects the IT HelpDesk Agent role and shows the HelpDesk tree with HelpDesk Profile information. If the view type is *Customer*, the system selects the PeopleSoft User role because it has a sequence number less than that of the Support Admin role.

Note: When integrating with PeopleSoft or E-Business HCM, the information on the Configure Role page determines in part the data that needs to be brought over from the corresponding Human Resource system. Unlike the integration to PeopleSoft HCM, no entity level security is imposed by Oracle E-Business. In E-Business, security is imposed by the virtue of the functions to which the user has access.

Transaction Sub-Interactions Page

Use the Transaction Sub-Interactions page (RB_TD_SUB_TRANS) to define the transactions for which to capture subinteractions.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Configure Role** > **Transaction Sub-Interactions**

This example illustrates the fields and controls on the Transaction Sub-Interactions page.

| Configure Role | Transaction Sub-Interactions | Node Sub-Interactions |

Role Name HRHD Level One Agent

Transaction Name HRHDTRAN

Capture Sub-Interactions for

Transactions   Personalize | Find | View All | 🗗 | 🔠   First ◀ 1-2 of 2 ▶ Last

*Transaction	Transaction Type ID	Capture Sub-Interaction		
Add IT Helpdesk Case 🔍	CADD-05	☑	➕	➖
Add HR Helpdesk Case 🔍	CADD-06	☑	➕	➖

▼ Audit History

Created 07/24/2002 5:54PM PDT   **By** wlu

Modified 03/09/2005 11:59AM PST   **By** amaurya

* Required Field

When you access this page, all transactions that are associated with the transaction group appear.

Field or Control	*Description*
Capture Sub-Interaction	Select to enable the corresponding transaction to capture subinteractions for this role. **Note:** Not all transactions were designed to be able to capture sub-interactions. The **Capture Sub-Interaction** check box is disabled for any transaction for which it does not apply.

Node Sub-Interactions Page

Use the Node Sub-Interactions page (RB_TD_SUB_NODE) to define the nodes for which to capture subinteractions.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Configure Role** > **Node Sub-Interactions**

This example illustrates the fields and controls on the Node Sub-Interactions page.

When you access this page, all tree node descriptions that are associated with the tree appear.

Field or Control	Description
Capture Sub-Interaction	Select to enable the corresponding tree node to capture subinteractions. **Note:** Not all nodes were designed to be able to capture sub-interactions. The **Capture Sub-Interaction** check box is disabled for any transaction for which it does not apply.

Dynamic Grid Page

Use the Dynamic Grid page (RB_TD_DYNGRD_PG) to define the grid on which transaction information appears.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Dynamic Grid** > **Dynamic Grid**

This example illustrates the fields and controls on the Dynamic Grid page (1 of 2).

This example illustrates the fields and controls on the Dynamic Grid page (2 of 2).

Retrieval Type

Specify either the database view or the application class that is the source of the data that populates the dynamic grid.

Field or Control	Description
View and **View Name**	Select to indicate that the data source is a database view. Enter the name of the database view that holds data that is returned by the database view.
Application Class	Select to indicate that an application class runs to provide the data that appears on the dynamic grid.
Record Name	Enter the name of the record that holds data that is returned by the application class method.
Class, Class Path, and Method Name	Enter the application class information for this application class. The method that your assign here is used to create the request message and populate the node with the requested information.
Package Tree Viewer	Click to locate an application class.

Grid Information

Enter data that names the grid and describes its appearance.

Field or Control	Description
Visible Columns	Enter a number to specify how many of the fields defined in the **Grid Field** section will initially display in the dynamic grid. The first *n* fields (in order based on Sequence Number) from the **Grid Field** definitions will be displayed based on the number that is provided in the **Visible Columns** field. 360-Degree View users will be able to view the entire set of fields for the dynamic grid, if desired, by clicking the **Show All Columns** link.

Grid Keys

Field or Control	Description
Field Name	Enter the name of the field that the system uses as a key when transferring to another component.
Sequence number	Enter the sequence of the key.

Grid Field

Enter information that describes each field that appears in the grid. Add fields using the **Add a new row** (+) button.

Field or Control	Description
Field Name	Select the name of the field whose values you want to appear in the grid. Available fields are based on the view name or the record name selected in retrieval type section.

Display Type	Select one of the following to indicate how the Field Name value will be displayed on the grid:
	
	• *Hyperlink*
	
	   Select to enable the user to initiate the transfer by clicking on the field value text.
	
	• *Long Translate*
	
	   This option is for the display of a string that contains the Long translate (XLAT) value of the field, provided the field is based on a translate table.
	
	• *Others*
	
	   Select this option to display the value as read-only.
	
	• *PushButton*
	
	   Select to make the field appear as a button that initiates the transfer.
	
	• *Related Display*
	
	   This option is for the display of a custom element.
	
	• *Short Translate*
	
	   This option is for the display of a string that contains the Short translate (XLAT) value of the field, provided the field is based on a translate table.

Label ID	If you want the field to be displayed by its label, select *Field Label ID*.
Label Type	If you selected Field Label ID, indicate if you want to display the *Long Name* or *Short Name* for the field label.

Field or Control	Description
Sequence number	Enter the a number *1* or greater number to indicate the position of the text field in relation to the other text fields you define.
Description	The system displays the text description specified for the **Label ID** field. It is not editable here.

Related Actions Page

Use the Related Actions page (RB_TD_DYNGRD_ACT) to relate actions to dynamic grids.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Define Action Category** > **Related Actions**

This example illustrates the fields and controls on the Related Actions page.

Field or Control	Description
Order	Enter the number *1* or a greater number to indicate the order in which you want the action to appear in the Actions drop-down list at the top right corner of the dynamic grid page.
Context Required	Select if you want the system to require the user to select a row from the grid when selecting this action. The context itself is specified in the action category to which the action belongs. When the user clicks the **Go** button for the **Action** drop-down list box, the default values defined in the actions are made available in a global record along with the selected rows in the grid. The system then triggers the method associated with the action category. See Action Category Page.
Disable for Inactive BO	Select to prevent the action from being performed on business objects that are inactive.

Field or Control	Description
Default	Select to display the action in the drop-down list.
Status	Select *Active* or *Inactive*. The default is *Active*. Only *Active* actions appear in the Action drop-down list box.

Configuring the 360-Degree View Search Page

To configure the 360-degree view search page, use the User Links (RB_TD_ANON_LINKS) and 360-Degree Search Preferences (RB_TD_USRSRCHPREF) components.

This topic provides an overview and discusses how to configure the 360-degree view search page.

Pages Used to Configure the 360-Degree Search Page

Page Name	Definition Name	Usage
User Links Page	RB_TD_ANON_LINK_PG	Define user links that appear on the 360-Degree Search page.
Application Packages Lookup Page	RB_APPLPKG_PG1	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Search Preferences Page	RB_TD_USRSRCHPREF	Select the search page that you use to access the 360-Degree View.

Understanding 360-Degree View Search Pages

360-Degree View search pages use the customer identification framework to identify the customer or worker whose information appears on the 360-Degree View. Different 360-Degree View search pages are defined for each of the PeopleSoft CRM industry solutions or markets. You can control which search page a user accesses by setting the user's market preferences.

Additionally, you can create user links (which you click to access a component) that appear on these search pages.

Related Links

"Customer Identification" (Business Object Management)
Managing 360-Degree Views

User Links Page

Use the User Links page (RB_TD_ANON_LINK_PG) to define user links that appear on the 360-Degree Search page.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **User Links** > **User Links**

This example illustrates the fields and controls on the User Links page (1 of 2).

This example illustrates the fields and controls on the User Links page (2 of 2).

Note: Currently, PeopleSoft CRM provides predefined user links for the search pages in the financial industries.

Field or Control	*Description*
Base Market	The base market where this user link applies.
Component Name and **Page Name**	The component and page where this set of user links appears.
Description	The description for this set of user links.

User Links

Define each user link that appears on the search page.

Field or Control	*Description*
Sequence	Enter a number that the system can use to determine the order in which the user links appear on the page.
Active	Select the status of the user link, either *Active* or *Inactive*. Only active user links appear on the page.
Link Name	Enter the link name. This appears on the page as the user link.

For each user link that you define, select the option that defines the action taken when the user clicks the link. Actions are:

Field or Control	Description
Transfer	Select to have the user link transfer to a PeopleSoft CRM component and page that you define. If you select **Transfer,** use the **Market, Menu Name, Menu Bar Name, Item Name** (component name), **Page Name,** and **Mode** fields to select where you want the user link to take you.
Application Class	Select to have the user link calls a PeopleSoft CRM application class. If you select **Application Class,** enter the **Class, Class Path Like,** and **Method Name** fields to define the application class that the system to call.
Package Tree Viewer	Click to access the Application Packages Lookup page to search for and view the available application packages that PeopleSoft CRM provides. The information that you select on this page appears on the User Links page after you click **OK.** See Application Packages Lookup Page.
Portal Content Reference	Select to have the user link transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the **Portal Name** and **Portal Object Name** fields to select the portal page to which you want to transfer.

Search Preferences Page

Use the Search Preferences page (RB_TD_USRSRCHPREF) to select the search page that you use to access the 360-Degree View.

Navigation:

Set Up CRM > **Common Definitions** > **360-Degree View** > **Search Preferences** > **Search Preferences**

This example illustrates the fields and controls on the Search Preferences page.
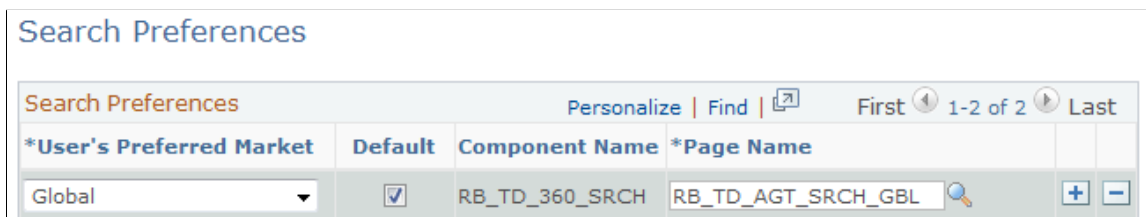
Select the default search page that you want to use to access the 360-Degree View for the different markets. You can define a different search page to access the 360-Degree View for each market.

The system checks the user's preferences to determine the market that is associated with that user and then uses the search preferences that you define on this page to determine the search page that appears when users access the 360-Degree View. If you do not define a market value for the user on the user preferences page, the system uses the search page that is associated with the Global market from this page.

Note: The search preference defaults to the search page that is associated with the Global market.

Field or Control	*Description*
User's Preferred Market	Select a preferred market if it is not already shown on the page.
Default	Select to indicate the page that you want the system to display in the selected row when no market preference exists for the user.

Chapter 19

Using the 360-Degree View

Understanding the 360-Degree View

This topic discusses:

- 360-degree views.

- 360-degree view toolbar.

360-Degree Views

360-degree views provide a summary view of overall activity for a business object—a customer, contact, or worker. From a 360-degree view, you can review or initiate transactions, record interactions and subinteractions, view relationships, and view tasks for the business object.

A 360-Degree View page includes these page regions:

Region	Details
Role	This drop-down field lists the roles that are associated with the business object whose information appears on the page. You can select a role to filter data and transactions so that only those that pertain to that role appear in the view. See "Business Object Relationship Modelling" (Business Object Management).
Actions	This field lists the transactions that are defined for the 360-Degree view page. Select the transaction to perform the associated actions or to transfer to the page that performs the desired actions. Transactions populate relevant fields on the transaction page from the data that is identified on the 360–Degree View page. See Configuring Actions and Transactions for the 360-Degree View.
Summary	Information such as name, contact information, and customer value appears here. The Summary page region can include up to two buttons that transfer to components that contain more information about the business object. Depending on the 360-Degree View profile configuration, users may be able to modify the person's or company's phone and email data in the CRM database from this section (note that this is not available for all 360-Degree Views, such as those for HR HelpDesk).

Region	Details
Activities	Activities appear in a tree format that contains a record of all transactions, interactions, and subinteractions that involve the business object. Transactions are grouped under nodes. Select a node to view, add, modify, or search for a transaction. The specific nodes that appear on the Activities tree vary depending on the business object and role that you select. Interactions are grouped by date. See Setting Up the 360-Degree View Tree.
Date Filter	This field enables you to select a date range that controls which transactions appear in the tree.
<activity> Detail	The information that appears in this area changes depending on which node you select in the activities tree. Summary information about the transactions that are under the node that you select in the 360-Degree view tree appears in this grid. When you first access the 360-Degree View page, the system displays information that is controlled by the default setting that is specified for the page. See Setting Up the 360-Degree View Tree.
Log Interaction	Using this group box, you can capture interaction details, record the callback date and time, attach notes to the interaction, and send an email to the customer or internal personnel (if the email address is set up). See Understanding Interactions.
Current Actions	This area lists all the transactions that occur during the current interaction or current 360–degree view session.
Relationship Viewer	All of the business object relationships for the customer are accessible from this page. See "Understanding the Relationship Viewer" (Business Object Management).
Tasks	This page lists all the tasks that pertain to the business object. You can drill down to view the task detail. See Understanding Task Management.
Call Reports	This page lists all the call reports that pertain to the business object. You can drill down to view the call report detail. See Understanding Call Reports.

The specific information that you see on a 360-Degree View page varies depending on whether you are viewing a customer, contact, site, or worker.

The system records all interactions with the business object and displays them in the Activities section of the 360-Degree View page. An interaction can contain multiple subinteractions. For example, a call with a customer might involve a case being updated, a service order being added, and a note about the customer. All of these subinteractions are logged under the same interaction.

The specific activities and transactions that appear in the Activity Tree page region and Actions drop down box differ depending upon which 360-degree view you access.

You can utilize these types of 360-degree views:

- Customer

  Customer 360-Degree View is used to manage transactions and activities that relate to customers, sites, and contacts of customers.

- Worker

  Worker 360-Degree View is used to manage cases and interactions for workers who call the help desk for support.

  See PeopleSoft Call Center Applications.

- Constituent

  Constituent 360-Degree View is used when integrating with PeopleSoft Campus Solutions to manage cases and activities for individuals who call the service center. In addition to the sections that appear on all 360-degree views, Constituent 360-Degree View includes display-only information about the individual's academic information, if applicable, including checklists, communication, and comments; recruiting; admissions; transfer credits; academics; finances; financial aid; transcript requests; contributor relations; and affiliations.

  See "PeopleSoft CRM Call Center Business Processes" (PeopleSoft Call Center Applications).

  Three trees are delivered for higher education. Information Technology (IT) related issues are shown in the Higher Education IT Tree while the Higher Education Support Tree is designed to show non-IT related issues. The Higher Education Blended Tree shows both IT and non-IT related issues. The Configure Role page is used to associate a tree with a particular role

- Worker and Person of Interest (POI)

  HRHD 360-Degree View is used to initiate transactions and manage activities that relate to the HR data for workers or persons of interest. In addition to the sections that appear on all 360-degree views, the HRHD 360-degree view includes information about the worker's job and position, payroll information, and benefits. It also supports the viewing of information for POIs.

  HRHD 360-Degree View provides security that is based on section-level information only. There is no field-level security. For example, if an agent has access to information for one job and not the other, or the agent only has access to part of the information, the system still retrieves all job information. This enables a true 360-degree view of an employee.

See *PeopleTools: Security Administration* product documentation, and Understanding PeopleSoft CRM Security.

Using the 360-Degree View Toolbar

Toolbars are configurable and customizable. In addition, you can give end-users the ability to personalize their own toolbar.

See "Defining Toolbar Buttons" (Automation and Configuration Tools).

PeopleSoft CRM delivers these buttons for the 360-Degree View toolbar:

Term	*Definition*
	Click the **Reload** button to refresh the information that appears on the 360-Degree View tree. **Note:** Clicking this button will not refresh other sections of the page: only the data in the 360-Degree tree itself is reloaded.
	Click the **New Search** button to finish the interaction with the current customer and return to the Search page. Depending on the option that was selected for Callback Interaction when the tree was originally set up, the interaction status is either identified as *Completed* or left open for further activity with the customer.
	Click the **Notification** button to send a notification. See "Understanding Manual Notifications" (Automation and Configuration Tools).
	Click the **Correspond** button to send ad hoc email correspondence. See "Understanding Correspondence Creation" (Automation and Configuration Tools). **Note:** This button does not appear for the Company role.
	Click the **Add to My Contacts** button to add the selected contacts to the My Contacts list.

Term	Definition
	This icon is intended for use only when integrating with PeopleSoft Campus Solutions.

Click the **Academics** button to transfer to the Career page of the Academics component. This page will be displayed directly if there is only one combination of Institution and Career for the individual on the 360-Degree View page. If there is more than one such combination, the search page for the Academics component will be displayed. |
| | This icon is intended for use only when integrating with PeopleSoft Campus Solutions.

Click the **Test Scores** button to transfer to the Test Scores page for the constituent. |
| **Return** | Click to transfer back to the Contact 360–Degree View page from which you accessed the Company 360-Degree View. This button appears only if you transfer to the Company 360-Degree view by clicking 360–Degree view icon in the summary section of Contact 360–Degree View. |
| **Personalize** | Click the **Personalize** link to personalize the toolbar buttons. |

Related Links

"Understanding the Configurable Toolbar" (Automation and Configuration Tools)

Managing 360-Degree Views

This topic discusses how to manage 360-Degree Views.

Pages Used to Manage 360-Degree Views

Page Name	Definition Name	Usage
Search for <Business Object> Page	RBQ_BOSRCH	View search results for a business object (customer, constituent, worker, or person of interest).

You can also enter criteria to refine the existing search, or enter data for a new search. |
| 360-Degree View Page | RB_TD_AGENT_VIEW | Manage overall activity for the business object (customer, constituent, worker, or person of interest). |

Page Name	Definition Name	Usage
Relationship Viewer Page	RB_TD_REL_VIEWER	View the relationships for the business object whose information appears on the 360-Degree View page.
Tasks Page	RB_TD_TASK_LIST	Maintain the tasks that are associated with the business object whose information appears on the 360-Degree View page.
Call Reports Page	RD_TD_CR_LIST	Maintain the call reports that are associated with the business object whose information appears on the 360–Degree View Page.

Search for <Business Object> Page

Use the Search for <Business Object> page (RBQ_BOSRCH) to view search results for a business object (customer, constituent, worker, or person of interest). You can also enter additional criteria to refine your existing search, or enter data for a new search.

Note: When you sign into the CRM system and access a 360-Degree View for the first time, the initial search dialog page appears, which enables you to select a business object to view in the 360-Degree View. When you access the 360-Degree View for that business object type again in the same login session, the system skips the initial search dialog page and displays the 360-Degree View component of the previously selected business object automatically.

Navigation:

- **Customer 360-Degree View** > **Search for Customer**

- **Constituent 360-Degree View** > **Search for Constituent**

- **Worker 360-Degree View** > **Search for Worker**

- **HRHD 360-Degree View** > **Search for Worker and Person of Interest**

This example illustrates the fields and controls on the Search for <Business Object> page.

The systems displays the criteria that you entered on the original search dialog page and the results of the search based on that criteria..

Note: This search uses the customer identification framework.

See "Customer Identification" (Business Object Management).

Search Criteria

You can enter additional search criteria to refine your existing search, or clear the data and enter new data for a new search.

Search Results

If more than one match for the search criteria that you enter is found, then all business objects that match the search criteria appear in the search results grid. If only one record matches the search criteria, then the 360-Degree View page for that object appears.

Select an existing business object from the results to access the 360-Degree View pages for that customer, constituent, worker, or person of interest.

For business objects that are contacts of customers, one row appears in the Search Results page region for each customer that the individual represents. The Name column that appears in the row for an individual identifies the company that the individual represents, and the Consumer column identifies the consumer that the individual represents. If both the Name and Consumer columns in a row are blank, then the individual listed in the row is a consumer.

Field or Control	Description
Select Action	Select a role for the business object you like to create. Click the **Go** button to transfer to the corresponding page where you continue with the business object creation process. The system prepopulates this page with data that was entered previously as search criteria.

The system determines the available roles from the search criteria that you entered. For example, suppose that you enter a value in the **Organization** field, the available role is *Company,* but if you enter a value in either the **First Name** or **Last Name** field, the available roles are the roles that are associated with the individual business object type: *Create Company with Contact, Create Consumer,* and *Create Consumer with Contact.*

In the case of Worker 360 Degree View, a link appears where you can create workers. As for HRHD 360 Degree View, you have the options to create either workers or POIs.

To use this functionality, you must have previously set up Quick Create for that object. Once you create the new business object, the system transfers you to the 360-Degree View page automatically, using the newly created business object. |

Related Links
"Understanding Business Object Controls" (Business Object Management)
"Searching for Business Objects" (Business Object Management)

360-Degree View Page

Use the 360-Degree View page (RB_TD_AGENT_VIEW) to manage overall activity for the business object —customer, constituent, worker, or person of interest.

Navigation:

Select an existing business object (customer, constituent, worker, or person of interest).from the search results grid on the Search for <Business Object> page for that business object type.

Note: The customer 360-Degree View page is used here for illustration purposes. The 360-Degree View page the other business objects is similar in usage.

This example illustrates the fields and controls on the 360-Degree View page (1 of 2).
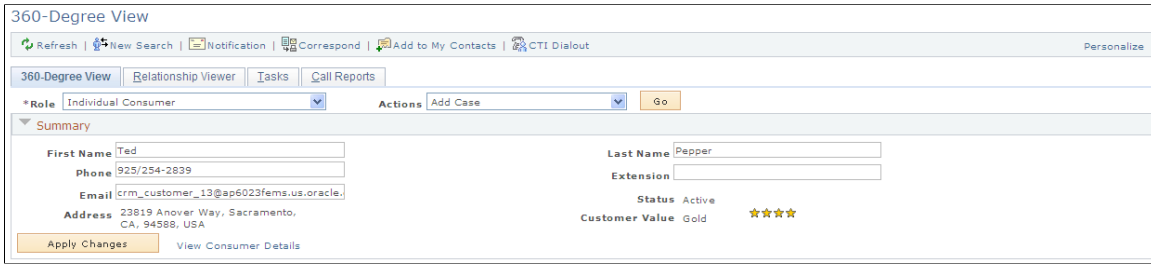
This example illustrates the fields and controls on the 360-Degree View page (2 of 2).

Field or Control	Description
Role	Select a role that is listed for the customer, worker or contact. The profile changes to reflect data that is relevant to that role.
	Note: Not all roles of an individual will be displayed on all versions of the 360-Degree View page. For example, the consumer role will not be displayed on Worker 360-Degree View or HRHD 360-Degree View. If the individual whose information is being viewed in the Worker 360-Degree View page also has a consumer role, use the left hand navigation to open the Customer 360-Degree View page and search again for that individual.
	Similarly, the worker role will not be displayed on the Customer 360-Degree View page. If the individual whose information is being viewed in the Customer 360-Degree View page also has a worker role, use the left hand navigation to open the Worker 360-Degree View page and search again for that individual.

Field or Control	Description
Actions	Select the action that you want to perform from the 360-Degree View. Delivered values include *Add Case, Add Defect, Add Install Product, Add Lead, Add Opportunity, Add Order, Add Quote, Add Service Order, Installed Product Hierarchy, Add Quote, Add RMA* (return material authorization), *Product Registration, Student Service Center, Person Profile,* and *Add Case - Admissions Status Inquiry.* The particular actions shown depends on the 360-degree view being used.
Phone, Email, and **Extension**	Enter new data to update customer, worker, and contact profile information. Click the **Apply Changes** button to enter and permanently update the changes. The ability to enter or edit data in these fields is configurable. Users who are not able to edit these fields will still see the existing values listed in display-only format.

Note: On the Constituent 360-Degree View, the labels for phone, email and address may also indicate the corresponding type, such as *Dorm Phone, Campus Email,* or *Home Address.*

The following fields appear in the Summary region only for the Constituent 360-Degree View when viewing information for a consumer (academic constituent):

Field or Control	Description
	The FERPA indicator icon enables the user to view details about the restrictions that the student has requested regarding the disclosure of certain types of directory information. Clicking the icon transfers the user directly to the Campus Community FERPA page.
and	The Positive and Negative Service indicator icons enables the user to view details about the service restrictions or service privileges associated for each indicator. Clicking an icon transfers the user directly to the Manage Service Indicators page in Campus Solutions.
	Click the Affiliations icon view details regarding the academic constituent's affiliations.
ID	This is the automatically generated ID from Campus Solutions used to identify the constituent within the PeopleSoft Campus Solutions system.
Campus ID	This is the ID selected by the academic institution to identify the constituent (for example, for use on student identification cards).

Field or Control	Description
Current Status	Displays the current academic status for the constituent. Separate statuses are shown for each combination of institution and career for the most recent applicable term. Only the most advanced status is shown for each institution and career combination. The available status values are (from lowest to highest): *Suspect, Prospect, Applicant, Student,* and *Alumnus*. If the same status exists in multiple institution and career combinations, only that for the most recent status date or source date is shown. If the dates are the same, then only the status from the institution/career in first alphabetical order is shown.
Deceased	This text appears in the summary area if the individual consumer whose information is being viewed is deceased. If the consumer is deceased, no FERPA, Service Indicator, or Affiliations icons will be displayed for the individual.

Activities

This region contains the 360-Degree View Tree, which displays all activities and interactions with the customer.

Activities are grouped by transaction type. Expand the folder or icon next to a transaction type to view activities for that transaction type.

Depending on the way the system is configured, you can add transactions or search for transactions of a particular type. Click a detail link to access transaction detail or click the activity summary to view a grid that lists summary information about the transactions.

Field or Control	Description
Date Filter	Select the date filter for the activities that you want to view. Values are *1 - Today, 2 - Yesterday, 3 - Last Week, 4 - Last 2 Weeks, 5 - Last Month, 6 - Last Year,* and *7 - View All.* If you select *6 - Last Year* and the tree header has a maximum date filter of *5 - Last Month,* the system stops the user from viewing records that are older than the maximum date filter criteria. If you select *7 - View All* and you don't enter maximum date filter criteria in the tree header, the system displays all of the records. When the 360-Degree View page initially appears, the date range that you specify in the profile of the user who is currently accessing the system appears by default. If the user's profile is not available, the system displays the activities for the date range that you specify in the tree. When defining the tree, you specify the date filter and maximum date filter to use when displaying this page. See Setting Up the 360-Degree View Tree.
From and **Through**	Enter the date range for the information that you want to see on the 360-Degree View. After you enter the date range, click the **Go** button. **Note:** The system displays the **From** and **Through** fields on this page only after you enable data filtering on the 360-Degree View - Personalize page.
First, Previous, Next, Last, Left and **Right**	Click to navigate the Activities tree. Navigation links become active if the number of items included in the tree or the length of these tree items exceeds the limit that can be displayed at any given time.

Activities Detail

The system displays a dynamic grid that lists key information from the most recent transactions and associated actions for the activity type that you click in the 360-Degree view tree.

The label for this grid changes depending on the type of information you view. For example, when you expand the Agreements node in the 360-Degree view tree, and then click the Active child node, the system displays the Agreements-Active dynamic grid and shows important information from agreement records. It can also provide an action link for further interactions concerning an agreement, such as viewing its details. You can configure the associated actions, the number of transactions, and the columns that appear in this grid.

Note: For performance reasons, a maximum of 100 entries will be retrieved for display in the dynamic grid at any one time.

See Dynamic Grid Page.

Log Interaction Note

The fields in the Log Interaction section capture the details of an interaction.

Every time that you record a subinteraction on this page, the system groups the subinteractions into one related interaction. You can perform multiple subinteractions for a customer at one time before you leave this page. The subinteractions that you created previously appear in the **Current Actions** group box.

Note: Interactions that are automatically generated through correspondence management are not related to the values in the drop-down menus on the 360-Degree View page. Interactions that are generated through correspondence management do not appear in reports that track which contact methods are used most often by agents for interactions with customers or contacts through the 360-Degree View page.

Field or Control	Description
Contact Method	Select the contact method for the interaction. Delivered values include *Inbound Chat, Inbound Email, Inbound Fax, Inbound Phone, Inbound Web, Outbound Email, Outbound Fax,* and *Outbound Phone.*
Interaction Status	Select the interaction status. Delivered values include *Busy, Callback, Child Answered, Completed, Do Not Call Again, In Progress,* and *No Answer.*
Callback Date and **Callback Time**	Enter a date and time for callback.
Add Note	Enter a note to add to the interaction. The note is saved in the 360-Degree View Tree as a subinteraction.
Email Note	Click to send the note to the customer.

Related Links
"Understanding Persons" (Business Object Management)

Relationship Viewer Page

Use the 360-Degree View - Relationship Viewer page (RB_TD_REL_VIEWER) to view the relationships for the business object whose information appears on the 360-Degree View page.

Navigation:

Select the **Relationship Viewer** tab on the 360-Degree View page for the business object.

See "Understanding the Relationship Viewer" (Business Object Management).

Tasks Page

Use the Tasks page (RB_TD_TASK_LIST) to maintain the tasks that are associated with the business object whose information appears on the 360-Degree View page.

Navigation:

Select the **Tasks** tab on the 360-Degree View page for the business object.

See Understanding Task Management.

Chapter 20

Setting Up Customer Self-Service

Understanding Customer Self-Service Setup

This topic discusses:

- Self-service sites.

- Self-service user registration.

- Contact Us notifications.

- Product registration.

Self-Service Sites

Several aspects of a self-service site are controlled by characteristics of the user ID that provides site access. When users first access a site, they are logged on to the site with a guest ID. This guest ID is specified in the site's configuration properties file or defined on the query string of the uniform resource locator that one uses to access the site. By setting up multiple guest IDs with different characteristics, you can create multiple self-service sites.

For example, you may want to create an English site and a Spanish site. Or you may want to create a European site that uses a European business unit, and a U.S. site that uses a U.S. business unit. You might even want to create multiple European sites that use different languages but that all point to the same European business unit. To accomplish all of this, create multiple guest IDs with the appropriate characteristics.

If you set up multiple guest IDs, the self-service sign in page enables users to switch between guest IDs. For example, if you set up guest IDs for different languages and use language names as IDs descriptions, then visitors can select from a list of languages. The system stores the label for the field that visitors use to select a guest ID in the message catalog to make it easy for you to change the label to suit your business needs.

Site Branding

You can create distinctive Web sites for your company's self-service sites by setting them up as branded sites. Use PeopleSoft Portal Pack to quickly implement a portal with your own "look and feel," or branding.

Related Links
PeopleSoft Portal Pack

Self-Service User Registration

A self-service user registers in one of these three ways, each of which is secured differently:

1. Existing customer.

   Customers who already exist in the system can add a self service user login for their account. To do so, they must enter information that you define to identify them as a current customer. After the system verifies their status, they must enter only a password to establish a self-service user ID. The system obtains other information from their existing customer record.

2. New customer.

   This is for new self service users who can be consumers or businesses. You must set up a guest account to handle each type of user that might register for self service because new user logins take their defaults from the guest account.

   Security is controlled by the privileges that you establish and assign to guest user IDs. A user first signs on using a guest ID that you provide. When the user registers, the system clones the currently active guest ID and all its access privileges to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

3. Contact of an existing customer company.

   A contact of an existing company can register as a business user who represents a customer company by entering a key that you define and provide to them.

To register, users are required to read and accept terms of service and a privacy policy that you set up.

User Passwords and Password Hints

A user can add a password hint question and answer when they register. This enables users who forgot their passwords to request new passwords after answering a hint question. A user can also change their password hint.

To enable this feature, you must set up forgotten password email text at the system level. Additionally, the user must:

- Have a primary email address.

- Establish a password hint during registration or through the Name and Sign In maintenance pages.

- Be associated with a permission list that permits the password to be emailed.

PeopleSoft CRM uses logic that is provides by PeopleTools to store the hint and answer, verify the hint that the user enters, and email the new password to the user.

See *PeopleTools: Security Administration* product documentation.

Related Links
Implementing Self-Service Security

Contact Us Notifications

Registered users (but not guest users) use the Contact Us page to send messages to you. When customers send messages, they select from a list of subjects and topics (subcategories of subjects) that you define to identify the message subject. When the customer submits the message, the system:

- Captures the message as an interaction that is visible through the 360-Degree View and other interaction lists.

- Notifies designated people that the message is submitted.

The system determines whom to notify based on the workflow action that you associate with the subject and topic of the message. The workflow action also determines whether notifications are sent to worklists or to email addresses.

Worklist notifications automatically include a link to the Interaction page; email notifications include a link only if the email template is so configured. The PeopleSoft-delivered CONTACT US FORM email template includes this link.

To take maximum advantage of interaction functionality, use the 360-Degree View to manage all follow-up communications. Using the 360-Degree View ensures that the system captures all follow-up communications as interactions. A direct email response bypasses the system and is not captured as an interaction.

Contact Us Chat

If the self-service page is enabled, , a registered self-service customer can request a live chat. This request opens the customer chat window, a browser-based window that does not require a client install or applet download.

Agents receive chat requests through the MultiChannel Console, which enables them to manage multiple simultaneous chat sessions. When an agent accepts a chat request, the agent chat window opens. Agents can conference peers and supervisors into the chat, and transfer chat sessions to other agents or queues. Agents can also initiate chats with other agents on their buddy lists.

Related Links

"Understanding the Chat Workspace" (PeopleSoft Multichannel Applications)

Product Registration

Self-service users can register products online through PeopleSoft Customer Self-Service and 360-Degree View. When a customer signs in and selects to register a product, the system populates the Product Registration page with two lists:

- Existing products

  The Existing Products section of the Product Registration page lists installed products that are already registered and their registration dates. Users click a registered product link to update the registration information or select an unregistered product to register.

- New products

Contains product catalogs, a product list, or both. The customer uses these to locate the product to register.In addition to registering products that already have installed products that are created for them, users can also use product catalogs to register new products. Product catalogs group products in a hierarchical fashion, which provides simple navigation for users to locate new products. As an administrator, you select product catalogs from the system to appear in the New Product section of the Product Registration page. Users can then drill down on any listed catalog to look for the products they want to register without having to remember and enter product names. You can also set up new catalogs that are specific for product registration. When users submit the registration, the system creates new installed products with the *Installed* status for products that users select from the new product list. For registered products, users select from the existing product list. The system updates the associated installed products with the information (date of registration, serial ID, and so on) that it collects from the product registration. You can specify what installed product fields are available for display or editing on the Product Registration - Product Registration Details page. You can also configure the system to display only installed products of certain statuses. This enables you to limit the registration process to installed products for which product registration makes sense; for example, if you don't want users to register an installed product that is canceled or uninstalled. Only registered users can register products through PeopleSoft Customer Self-Service.

Note: If the quantity of an installed product is greater than one, and they are under different statuses, the installed product appears in the Existing Products section if any one of those statuses is in the status list that you specify on the Product Registration Setup page.

Product Registration Using the 360-Degree View

Customer service representatives (CSRs) can register products for customers through the 360-Degree View. CSRs can view and update any existing installed products or select *Product Registration* in the **Go To** field on the page to register products for customers who call them on the phone.

Related Links

Implementing Self-Service Security
Setting Up Product Registration
Registering Products

Setting Up Guest IDs to Access Self-Service Sites

This topic discusses how to:

* Define guest IDs.

* Change the label of the guest ID selection field.

Defining Guest IDs

To define a guest ID:

1. Define the ID in the PeopleTools User Profiles component.

Access the User Profiles component from **PeopleTools** > **Security** > **User Profiles** > **User Profiles**.

On the General page, enter the language code that is associated with the ID. Anyone who logs on with a guest ID sees all of the pages that are in the associated language code.

On the ID page, enter the description that self-service users see in the guest ID selection field. For example, if you support multiple languages and you define language-based user IDs, the descriptions might be the language names.

See *PeopleTools: Security Administration* product documentation.

2. Establish the ID as a guest ID on the User Registration Setup page.

Access the User Registration Setup page from **Set Up CRM** > **Security** > **Self Service** > **User Registration**.

This is the step that makes the ID into a guest ID that enables personal and business user registration. That is, the self-service Sign In page enables users to select from IDs that have a user registration definition.

See Implementing Self-Service Security.

3. Define preferences for the guest ID on the User Preferences page.

Access the User Preferences page from **Set Up CRM** > **Security** > **User Preferences**.

Select a default business unit and market for the guest. If you do not select a business unit, the system uses the default PeopleSoft Order Capture business unit (as established on the Order Capture Definition page).

See Overall Preferences Page.

Related Links
"Understanding Business Units" (PeopleSoft Order Capture Applications)

Changing the Label of the Guest ID Selection Field

To change the label of the guest ID selection field:

1. Access the message catalog from **PeopleTools** > **Utilities** > **Administration** > **Message Catalog.**

2. Look up message set number *18068,* whose description is *Self Service Common.*

3. Click **Find** and enter message number *19* in the search string.

    The field label text appears. The default is *Select a different site to browse.*

4. Enter an alternative label for the guest ID selection field.

    For example, if the guest IDs are for different languages, you might enter *Select a language.*

5. Save the changes.

Setting Up Contact Us Features

To set up contact us features, use the Contact Us Topic (SUBJECT_TABLE) and Contact Us Subject (SUBJECT_TOPIC_TBL) components.

This topic lists prerequisites and discusses how to set up contact us features.

Pages Used to Set Up Contact Us Features

Page Name	Definition Name	Usage
Chat Enabled Page Setup Page	RB_CHAT_ADMIN	Specify chat features for Contact Us pages.
Contact Us Topic Page	CONV_SUB_TOPIC_TBL	Define topics that customers select when requesting that you contact them.
Contact Us Subject Page	SUBJECT_TABLE	Define subjects that customers select when requesting that you contact them, and set up workflow for each subject.

Prerequisites

When customers use the Contact Us page to communicate with you, they select from a predefined list of subjects and topics. When they submit the message, the system sends a notification to a designated person. You set up this workflow for each subject and topic combination that you define.

Before you create subjects and topics, you must define the workflow actions and workflow email templates that are to be used for these notifications.

Customers can also elect to open a chat with a customer service representative if you have enabled the chat feature and specified a chat profile and agent popup for on the self-service page.

Related Links
"Defining Workflow Actions for Business Projects" (Automation and Configuration Tools)
"Understanding the Chat Workspace" (PeopleSoft Multichannel Applications)

Chat Enabled Page Setup Page

Use the Chat Enabled Page Setup page (RB_CHAT_ADMIN) to specify chat features for Contact Us pages.

Navigation:

Set Up CRM > Product Related > Multichannel Definitions > Chat > Chat Page Setup > Chat Enabled Page Setup

This example illustrates the fields and controls on the Chat Enabled Page Setup page.
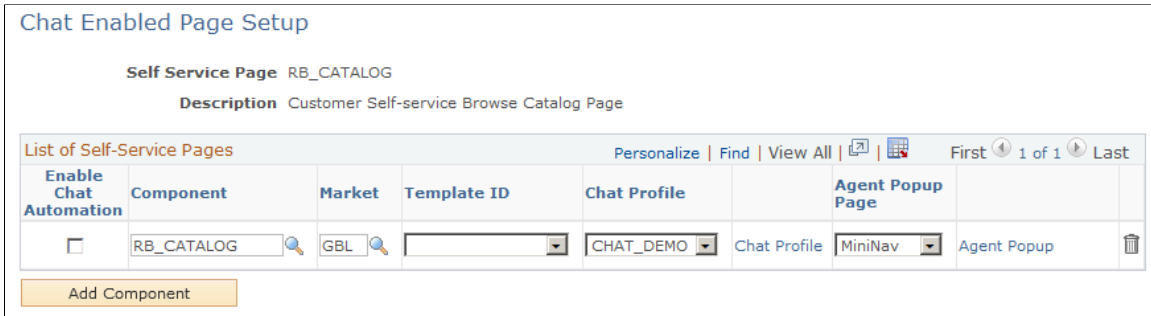
Related Links

"Understanding the Chat Workspace" (PeopleSoft Multichannel Applications)

Contact Us Topic Page

Use the Contact Us Topic page (CONV_SUB_TOPIC_TBL) to define topics that customers select when requesting that you contact them.

Navigation:

Set Up CRM > Common Definitions > Contact Us > Contact Us Topic > Contact Us Topic

This example illustrates the fields and controls on the Contact Us Topic page.

Specify a topic and topic description. You associate the topics with Contact Us subjects to enable users to select the subject and topic for a particular Contact Us request.

Contact Us Subject Page

Use the Contact Us Subject page (SUBJECT_TABLE) to define subjects that customers select when requesting that you contact them, and set up workflow for each subject.

Navigation:

Set Up CRM > Common Definitions > Contact Us > Contact Us Subject > Contact Us Subject

This example illustrates the fields and controls on the Contact Us Subject page.

When you define a subject, specify the associated topics and the workflow objects (a workflow action and correspondence template) that the system uses to deliver the customer's request to a particular worklist.

Field or Control	Description
Effective Date	Enter the effective date of the email template data.
Description	Enter a description of the subject (up to 36 characters).
Contact Us Topic	Select topics to associate with this subject.
Email Template	For each subject and topic combination, select the correspondence template that the system uses to create the text in its email notifications. Delivered templates are *Contact Us* and *Contact Us Confirmation.* Use the correspondence management framework to define correspondence templates and packages for use in the Contact Us feature. To add new templates, makes sure that the *Contact Us* usage is specified in their associated template packages.
Workflow Action	For each subject and topic combination, specify the workflow action that the system uses to send a notification that alerts a worker to the newly submitted message.

Setting Up Product Registration

To set up product registration features, use the Product Registration (RF_PROD_REG_SETUP) table.

This topic discusses how to set up product registration features.

Pages Used to Set Up Product Registration for Self-Service Users

Page Name	Definition Name	Usage
Product Registration Setup Page	RF_PROD_REG_SETUP	Configure the registration page for installed products.
Catalogs Page	RF_PROD_REG_SETUP2	Select product catalogs that self-service users can use to search for and register products.

Related Links

Product Registration

Registering Products

Product Registration Setup Page

Use the Product Registration Setup page (RF_PROD_REG_SETUP) to configure the registration page for installed products.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Product Registration** > **Product Registration Setup**

This example illustrates the fields and controls on the Product Registration Setup page.

Installed Product Statuses

Specify the statuses for which installed products (that belong to the self-service user) appear in the Existing Products section of the Product Registration page.

Note: Product registration setup is keyed to setID.

Field or Control	Description
Status	Select the status for installed products to appear on the Product Registration page.

Registration Fields

Define the installed product fields that appear to self-service users on the Product Registration Details page and whether the fields are modifiable or read-only. The system uses this information as default values on the Installed Product page of the Product Definition component. When a product requires a different set of fields to appear to self-service users, you can override the default fields in the Product Definition component.

Field or Control	Description
Name	Select the field to appear on the Product Registration Details page. Values are *Account Number, Agreement Code, Asset Subtype, Asset Tag, Authorization Code, Comments, Date Registered, Department, Distributor, Distributor Contact, Environment, Install Type, Item Shipping Date, Network, Operating System, Operating System Version, Order Date, Ownership, Physical Location, Platform, Purchase Date, Serial ID, Site ID,* and *User Interface.* The system uses this value as the name of corresponding fields that you see on the registration page.
Modifiable	Select to enable users to modify the corresponding field. Clear this check box for fields that need to be read-only when updating previously registered products on the Product Registration Details page. When registering a product for the first time, users can modify all fields except the product description and the registration date, whether or not you select this check box.

Catalogs Page

Use the Catalogs page (RF_PROD_REG_SETUP2) to select product catalogs that self-service users can use to search for and register products.

Navigation:

Set Up CRM > **Common Definitions** > **Installed Product** > **Product Registration** > **Catalogs**

This example illustrates the fields and controls on the Catalogs page.
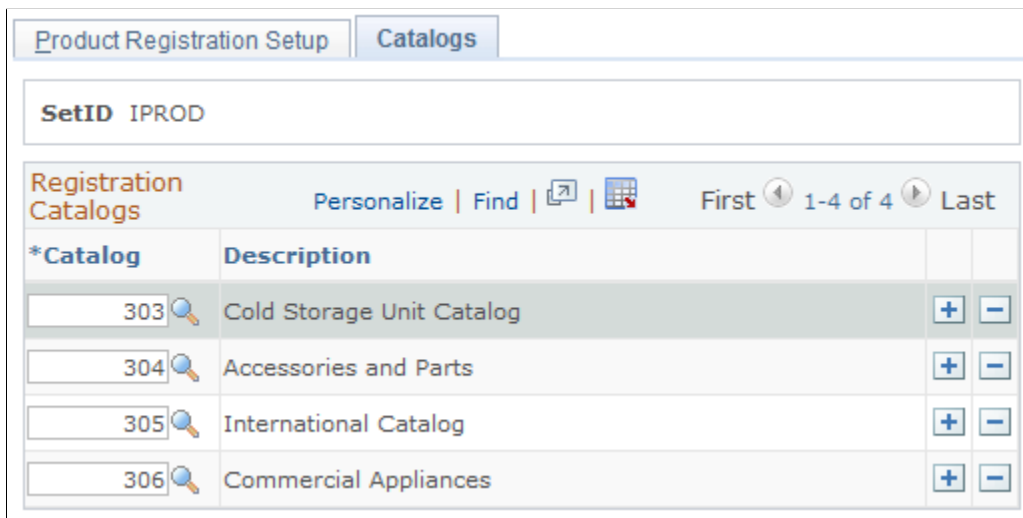
Field or Control	Description
Catalog	Select a product catalog that self-service users can access in the New Product section of the Product Registration page.

Chapter 21

Working with Customer Self-Service Transactions

Understanding Customer Self-Service

Self-service transactions enable customers to access information and transact business online. PeopleSoft CRM provides transactions for self-service users to:

- Register and sign in.

- Maintain their user profile (information about themselves and their relationship with you).

- Send messages to you or to chat live online with a customer service representative (CSR).

- Register products.

- Perform application-specific functions such as ordering products and submitting support cases.

This topic describes how users register, sign in, maintain their profiles, contact you, and register products. It also discusses the differences between self-service for consumers (personal users) and for contacts (business users). Application-specific transactions are described in the corresponding application product documentation.

Note: You can access several of the pages that are discussed in this topic from the pagelets in PeopleSoft CRM Portal Pack.

Related Links
"Understanding Order Capture Self Service" (PeopleSoft Order Capture Applications)
"Understanding Self-Service Transactions" (PeopleSoft Call Center Applications)
"Understanding Self-Service Pagelets" (PeopleSoft Portal Pack)

Self-Service Access for Higher Education

The CRM system exposes several self-service components and pages in the employee portal to make some of the self-service features available to Higher Education users in a non-self-service environment. These self-service objects are:

- Sign In page.

  See Sign In Page.

- Contact Us page.

See <u>Contact Us Page</u>.

- Customer Registration page.

    See <u>Customer Registration Page</u>.

- Contact Directory (internal contacts) page in the Service Center folder.

    See <u>Viewing Internal Contacts</u>.

- Change Profile Info component in the Manage Profile folder.

    See <u>Maintaining Name and Sign-In Information</u>.

- Default Addresses component in the Manage Profile folder.

    See <u>Maintaining Contact Information</u>.

- Address Book component in the Manage Profile folder.

    See <u>Maintaining Consumer Address Books</u>.

Roles and Permission Lists

The system delivers new roles and permission lists that grant self-service page access to Higher Education users in the employee portal.

Role Update

New roles are created and need to be assigned to Higher Education user IDs in order to access self-service pages in the employee portal. These roles are:

- *HE Self Service - Common* role.

    The system assigns this role to all delivered Higher Education user IDs (with the *SSS* prefix) except for marketing-specific ones.

- *HE Self Service - Profile* role.

    Assign this role to user profiles for suspect prospect users. By default, this role is assigned to the delivered SSS_SUSP_PROSP user ID.

    This role is associated with the CRHE1610 permission list.

- *HE Self Service - Faculty* role.

    Assign this role to user profiles for faculty users to ensure proper page access, for example, the Faculty Center, Internal Contacts page and the Contact Us page. By default, this role is assigned to delivered user IDs such as SSS_AA00100 and SSS_FACULTY.

- *HE Self Service - Student* role.

Assign this role to user profiles for student users and applicant users to ensure proper page access, for example, the Student Center, Internal Contacts page and the Contact Us page. By default, this role is assigned to delivered user IDs such as SSS_AA00100 and SSS_CONST.

Permission List Update

Permission lists are created and updated to grant page access to Higher Education users. Permission lists relate to user IDs through roles.

*   CRHE1600 (HE Service Center Self Service) permission list: updated to include CRM_PORTAL_COMPONENTS (CRM Portal Components) menu. In this menu, Internal Contacts (WC_CNTACT_DIR_COMP) and Contact Us (WC_CONTACT_US) will be authorized

*   CRHE1610 (HE Manage Profile Self Service) permission list: newly added. Includes the RB_SELF_SERVICE (CRM Self-Service) menu.

Self-Service Page Visibility

This table shows the self-service components and page that, as delivered, are visible in the employee portal by user type:

User Type	Sign In page	Contact Us page	Customer Registration page	Manage Profile folder	Internal Contacts page	Student Center	Faculty Center
Self service guest (sample user ID: *USGUEST*)	Y	Y	Y	Y	N	N	N
Administrator (sample user ID: *PS)*	Y	Y	Y	Y	Y	Y	Y
Suspect (sample user ID: *SSS_SUSP_PROSP*)	N	Y	N	Y	Y	N	N
Prospect (sample user ID: *SSS_SUSP_PROSP*)	N	Y	N	Y	Y	N	N

User Type	Sign In page	Contact Us page	Customer Registration page	Manage Profile folder	Internal Contacts page	Student Center	Faculty Center
Student (sample user ID: *SSS_CONST*)	N	Y	N	N	Y	Y	N
Applicant (sample user ID: *SSS_CONST*)	N	Y	N	N	Y	Y	N
Faculty (sample user ID: *SSS_FACULTY*)	N	Y	N	N	Y	N	Y
Student and Faculty (sample user ID: *SSS_AA00100*)	N	Y	N	N	Y	Y	Y

See PeopleSoft CRM for Higher Education.

Signing In to PeopleSoft CRM Self-Service

This topic discusses how to sign in to PeopleSoft CRM self-service.

Pages Used to Sign In to PeopleSoft CRM Self-Service

Page Name	Definition Name	Usage
Sign In Page	RX_LOGIN	Sign in to PeopleSoft CRM self-service.
Forgot Password Page	RX_EMAIL_PSWD	Request a password hint.
Forgot Password - Email New Password Page	RX_EMAIL_PSWD2	Answer a password hint question to complete the request for a new password.
Confirmation Page	RX_EMAIL_PSWD_CNFR	Confirm that passwords are reset and mailed.

Sign In Page

Use the Sign In page (RX_LOGIN) to sign in to PeopleSoft CRM self-service.

Navigation:

Sign In > **Sign In**

This example illustrates the fields and controls on the Sign In page.

Note: In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See Self-Service Page Visibility.

Returning Users

Enter the User ID and Password and click the **Sign In** button.

If you are already set up as a customer in the CRM system but do not have a self service sign-in, click the **Create Sign In** link to authenticate yourself as an existing user and create a new self service user ID and password.

New Users

You can register as a personal or business user.

Either personal or business user registration causes the system to create a user ID that is associated with the new consumer or contact record, which the visitor can use to sign in on subsequent visits. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options, and in some cases, page appearances depend on the user's role or roles.

Field or Control	Description
Personal User Registration	Click this link to establish a personal user ID. When a site visitor registers as a personal user, the system creates a consumer record for that user.
Business User Registration	Click this link to establish an ID as a contact for a company that is already set up in PeopleSoft CRM. When a site visitor registers as a business user, the system creates a contact record that is associated with the customer that the visitor specifies. Visitors must provide customer codes and keys that their site administrators give them for authentication purposes.

Website

When users first access the site, they are automatically logged in using the guest ID that you identify in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access. Then, users can sign in with their own user IDs and passwords to further identify themselves and acquire additional access.

For example, users who accesses the site as guests can access the product catalog but cannot view order statuses. Once the users sign in, they can access both the product catalog and order statuses. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics such as the site language.

Field or Control	Description
Select a website	Select a value to switch to a different ID. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics. You can change the delivered field label to more accurately reflect the guest ID options that you establish (for example, the **Select a Location** field with *United States, European Market,* and *Asia* values. If you have only one site, you can hide this section from the user).

Related Links

Registering As Personal or Business Users
Understanding Customer Self-Service

Forgot Password - Email New Password Page

Use the Forgot Password - Email New Password page (RX_EMAIL_PSWD2) to answer a password hint question to complete the request for a new password.

Navigation:

Click the **Continue** button on the Forgot Password page.

To request a new password, enter your user ID and click **Continue.**

Forgot Password Page

Use the Forgot Password page (RX_EMAIL_PSWD) to request a password hint.

Navigation:

Click the **Lookup Password Hint** link on the Sign In page.

You must correctly answer a personalized password hint question before the system creates and sends a new password.

Field or Control	Description
Email Address	The system displays your primary address, which is the address to which the system sends the new password.
Email New Password	Click after entering an answer to complete the request. After you click this button, a confirmation page appears.

Registering As Personal or Business Users

This topic discusses how to register as either a personal or business self-service user.

Pages Used to Register As Personal or Business Users

Page Name	Definition Name	Usage
Sign In Page	RX_LOGIN	Sign in to PeopleSoft CRM self-service.
Personal User Registration Page	RX_REGISTER	Register as a personal user.
Business User Registration Page	RX_REGISTER_REPCHK	Identify the company for a business user.
Register as a Business User for <Company> Page	RX_REGISTER_REP	Register as a business user.
Customer Registration Page	RX_REGISTER_CSTCHK	Register as an existing customer.

Page Name	Definition Name	Usage
Customer Registration Page	RX_REGISTER_CST	Enter user ID and password information to complete the process of registering as an existing customer.
Registration Confirmation Page	RX_REGISTER_CNFRM	Review registration information.

Personal User Registration Page

Use the Personal User Registration page (RX_REGISTER) to register as a personal user.

Navigation:

Click the **Personal User Registration** link on the Sign In page.

This example illustrates the fields and controls on the Personal User Registration page (1 of 2).

This example illustrates the fields and controls on the Personal User Registration page (2 of 2).

When you click the **Submit Registration** button, the system creates a new user ID and a new consumer record.

If a terms of service and privacy policy are set up for the self-service site, additional text containing links to these policies appears on this page. Be sure to read the terms of service and privacy policy before submitting the registration. By submitting the form, you are legally consenting to the terms in these documents.

Business User Registration Page

Use the Business User Registration page (RX_REGISTER_REPCHK) to identify the company for a business user.

Navigation:

Click the **Business User Registration** link on the Sign In page.

This example illustrates the fields and controls on the Business User Registration page.

Set up keys on the Business User Registration Setup page. You give customers their company codes and keys, and they share the information with users whom they want to register under their company codes.

When a user registers, the new contact record is associated with the company that you specify on this page.

Note: When you set up a key, you can limit the number of times that it is used.

Related Links
Business User Registration Setup Page

Register as a Business User for <Company> Page

Use the Register as a business user for <company> page (RX_REGISTER_REP) to register as a business user.

Navigation:

Click the **Continue** button on the Business User Registration page.

See Personal User Registration Page.

Customer Registration Page

Use the Customer Registration page (RX_REGISTER_CSTCHK) to register as an existing customer.

Navigation:

- Click the **Create Sign In** link on the Sign In page.

- Customer Registration, Customer Registration (in the employee portal for Higher Education users).

This example illustrates the fields and controls on the Customer Registration page.

Customer Registration

Enter security information to identify yourself as an existing customer and click Continue.

Security Information

*Email Address slister@deng.com

*First Name Sally

*Last Name Lister

Continue   Cancel and Return to Sign In

* Required Field

Note: In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See Self-Service Page Visibility.

If you already exist in the PeopleSoft CRM system as a customer or contact, you can register as a self-service user. You must enter information that identifies you to the PeopleSoft CRM system before you can complete the self-service registration process.

The fields that are available for entry on this page depend on how the user registration for existing customers is set up.

Field or Control	Description
Continue	Click this button to access a page where you enter sign in information, including user ID and password.

Registration Confirmation Page

Use the Registration Confirmation page (RX_REGISTER_CNFRM) to review registration information.

Navigation:

Click the **Submit Registration** button on the Registration page or the Register as a business user for
<Company> page.

One of two buttons appear here, depending on what you were doing before you registered. Click
Continue Shopping to access the product catalog. Click **Checkout** to go directly to the checkout page.

The **Continue** button is not visible on the page for Higher Education users who access the page in the
employee portal, the **Continue** button is not visible.

Selecting the Customers That Business Users Represent

This topic discusses how to select customers.

Page Used to Select the Customers That Business Users Represent

Page Name	Definition Name	Usage
Customer Selection Page	CUST_SELECT	Select customers for the current session. This page is available for users that are set up as brokers who buy for multiple companies.

Customer Selection Page

Use the Customer Selection page (CUST_SELECT) to select customers for the current session.

This page is available for users that are set up as brokers who buy for multiple companies.

Navigation:

Customer Selection > **Customer Selection**

This example illustrates the fields and controls on the Customer Selection page.

Select a customer from the customer list.

Maintaining Name and Sign-In Information

This topic discusses how to maintain name and sign-in information.

Pages Used to Maintain Name and Sign-In Information

Page Name	Definition Name	Usage
Manage Profile - Change Profile Info Page	RX_NAME_SIGNIN	Review and edit name, password information, and privacy preferences.
Manage Profile - Change Name Page	RX_NAME_CHNG	Update name information.
Manage Profile - Change Password Page	RX_PSWD_CHNG	Enter passwords.
Profile - Change Password Hint Page	RX_HINT_CHNG	Enter password hints.
Manage Profile - Change Privacy Preference Page	RX_PREF_CHNG	Select privacy options for screening communications.

Manage Profile - Change Profile Info Page

Use the Manage Profile - Change Profile Info page (RX_NAME_SIGNIN) to review and edit name, password information, and privacy preferences.

Navigation:

Manage Profile > **Change Profile Info**

This example illustrates the fields and controls on the Manage Profile - Change Profile Info page.

Note: In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See <u>Self-Service Page Visibility</u>.

Maintaining Contact Information

This topic discusses how to maintain contact information.

Pages Used to Maintain Contact Information

Page Name	Definition Name	Usage
Manage Profile - Default Addresses Page	RX_PROFILE_DFLTS	Manage default mailing, shipping, and billing address information.
Manage Profile - Contact Information Page	RX_ADR_MY_INFO	Update primary contact information.
Address Book - Create New Address Page Address Book - Update Address Page	RX_ADR_CUST_ADDR	Create or update addresses that are associated with the user.
Delete Confirmation Page	RX_ADR_DEL_CONFIRM	Confirm the deletion of the address, phone number, or email address.

Manage Profile - Default Addresses Page

Use the Manage Profile - Default Addresses page (RX_PROFILE_DFLTS) to manage default mailing, shipping, and billing address information.

Navigation:

Manage Profile > **Default Addresses**

This example illustrates the fields and controls on the Manage Profile - Default Addresses page.

Note: In addition to the self-service application, this component is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See Self-Service Page Visibility.

Manage Profile - Contact Information Page

Use the Manage Profile - Contact Information page (RX_ADR_MY_INFO) to update primary contact information.

Navigation:

Click the **Change Contact Information** button on the Manage Profile - Default Addresses page.

This example illustrates the fields and controls on the Manage Profile — Contact Information page.

The **Add New Address** button transfers you to a page where you can add address information. The **Add New Phone** and **Add New Email** buttons add a new row to the **Phone** or **Email** grid for you to enter the new information. The user can edit their current phone numbers and email addresses directly on this page.

Maintaining Contact Address Books

This topic discusses how to maintain contact address books.

Pages Used to Maintain Contact Address Books

Page Name	Definition Name	Usage
Address Book - View Addresses Page	RX_ADR_CUST_INFO	Review addresses that are associated with the customer.
Address Book - View Contacts Page	RX_ADR_CUST_CNTCT	Review contacts that are associated with the customer.
Address Book - Customer's Primary Information Page	RX_ADR_CUST_DFLTS	Review default contacts and addresses that are used for specific purposes.
Address Book - Create New Address Page	RX_ADR_REP_ADDR	Add a new address for a contact.
Address Book - Create New Contact Page	RX_ADR_NEW_REP	Create new contacts or new addresses for the customer.
Address Book - Select Contact Page	RX_ADR_USE_CNTCT	Select new primary contacts for the roles that appear on the Address Book - Customer's Primary Information page and to copy the contacts into new address book entries.
Address Book (New Address) - Select Address Page	RX_ADR_SEL_CUST_DF	Select new primary addresses for the address roles that appear on the Address Book - Customer's Primary Information page and copy the addresses into new address book entries.
Address Book - Contact Information Page	RX_ADR_REP_INFO	Edit an existing contact's information.
Address Book - Create New Address Page	RX_ADR_CUST_ADDR, RX_ADR_NEW_ADDR, RX_ADR_NEW_REP	Add a new address for a customer. You do not need to associate the address with a specific contact.
Address Book - Update Address Page	RX_ADR_CUST_ADDR, RX_ADR_REP_ADDR	Modify existing addresses.
Delete Confirmation Page	RX_ADR_DEL_CONFIRM	Confirm that you want to delete an address or contact. A deleted address is removed from the contact's address book but remains in the system with an end date that is equal to the date on which it was deleted.

Address Book - View Addresses Page

Use the Address Book - View addresses page (RX_ADR_CUST_INFO) to review addresses that are associated with the customer.

Navigation:

* **Manage Profile** > **Address Book**

* Click the **View Addresses** link on the Address Book (view contacts) page or the Address Book - Customer's Primary Information page.

This example illustrates the fields and controls on the Address Book - View Addresses page.
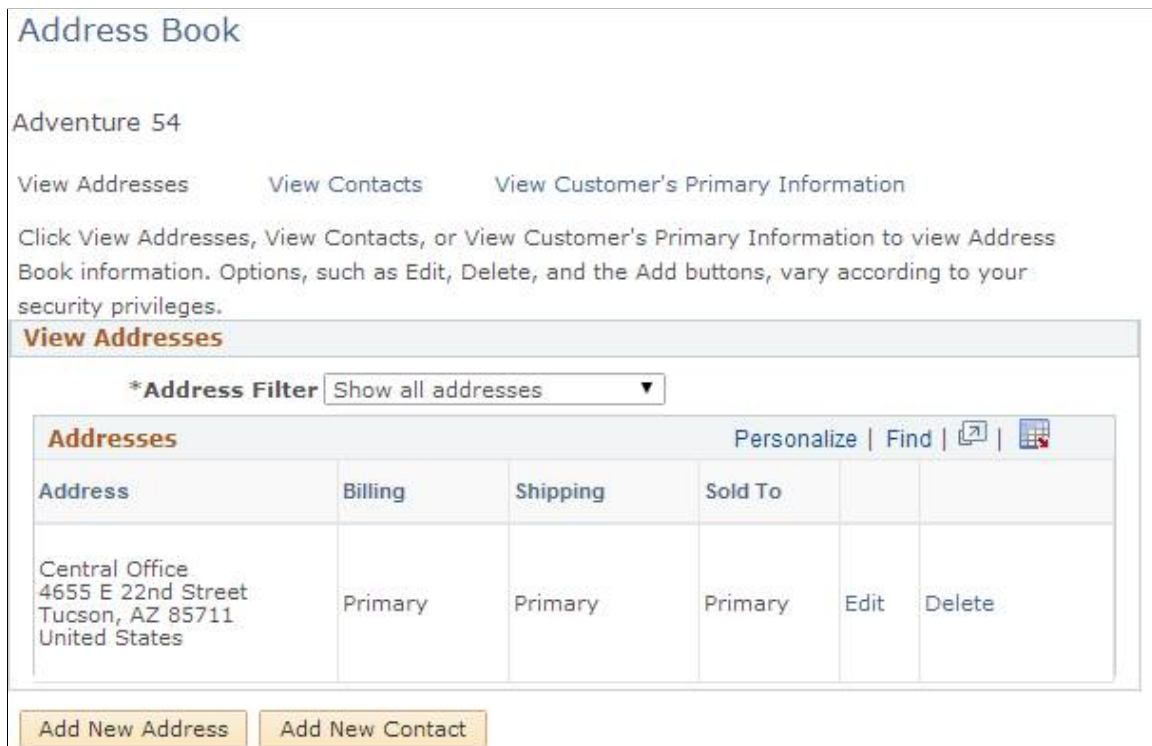
Addresses that are associated with the customer appear on this page. If the address is associated with a specific site, the site name appears as well.

Field or Control	Description
Address Filter	Select *Show all addresses, Show billing addresses, Show install-to site addresses, Show shipping addresses,* or *Show sold-to addresses.*
Billing, Shipping, and Sold To	*Primary* appears in the appropriate column for the primary billing, shipping, and sold-to addresses. *Yes* appears in the appropriate column for additional addresses. To change a company's primary addresses, access the Address Book - Customer's Primary Information page.

Deleting Addresses

When you click the Delete link for an address, the Delete Confirmation page appears.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Address Book - View Contacts Page

Use the Address Book - View Contacts page (RX_ADR_CUST_CNTCT) review contacts that are associated with the customer.

Navigation:

Click the **View Contacts** link on the Address Book - View Addresses page or the Address Book - Customer's Primary Information page.

This example illustrates the fields and controls on the Address Book - View Contacts page.

Contacts who are associated with the customer appear on this page.

Field or Control	*Description*
Billing, **Shipping,** and **Sold To**	*Primary* appears in the appropriate column for the primary billing, shipping, and sold-to contacts. *Yes* appears in the appropriate column for additional contacts. To change a customer's primary contacts, access the Address Book - Customer's Primary Information page.

Address Book - Customer's Primary Information Page

Use the Address Book - Customer's Primary Information page (RX_ADR_CUST_DFLTS) to review default contacts and addresses that are used for specific purposes.

Navigation:

Click the **View Customer's Primary Information** link on the Address Book - View Addresses) or Address Book - View Contacts page.

This example illustrates the fields and controls on the Address Book - Customer's Primary Information page.

The customer's overall primary contact and address and primary billing, shipping, and sold-to contacts and addresses appear on this page. You can modify the contacts and addresses or select a new primary contact and address.

Address Book - Create New Address Page

Use the Address Book - Create New Address page (RX_ADR_REP_ADDR) to add a new address for a contact.

Navigation:

Click the **Add New Address** button on the Address Book - Contact Information page.

This example illustrates the fields and controls on the Address Book - Create New Address page.

This page is similar to the Create New Address page.

Enter the new address information. If the address is a billing, shipping, or sold-to address, select the appropriate address role check box.

Note: The **Address Roles** appear only for users who are contacts of companies, not for end consumers.

Address Book - Create New Contact Page

Use the Address Book - Create New Contact page (RX_ADR_NEW_REP) to create new contacts or new addresses for the customer.

Navigation:

Click the **Add New Contact** button on the Address Book - View Addresses page or the Address Book - View Contacts page.

This page is similar in use to page that is used to create new contact addresses, except that it contains additional lines for you to enter contact information.

Contact Information

If the new contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

This example illustrates the fields and controls on the Address Book: Create New Address - Contact Information page.

This example illustrates the fields and controls on the Address Book: Create New Address - Address Information page.

Field or Control	Description
One use only - not a permanent address or contact	Select to create a temporary contract and address just for the corresponding transaction. **Note:** This field appears only if you are adding a shipping address.

Address Book - Select Contact Page

Use the Address Book - Select Contact page (RX_ADR_USE_CNTCT) to select new primary contacts for the roles that appear on the Address Book - Customer's Primary Information page and to copy the contacts into new address book entries.

Navigation:

- Click a **Replace** link on the Address Book - Customer's Primary Information page.

- Click the **Copy Existing Contact** link on the Address Book - Create New Contact page.

This example illustrates the fields and controls on the Address Book - Select Contact page.
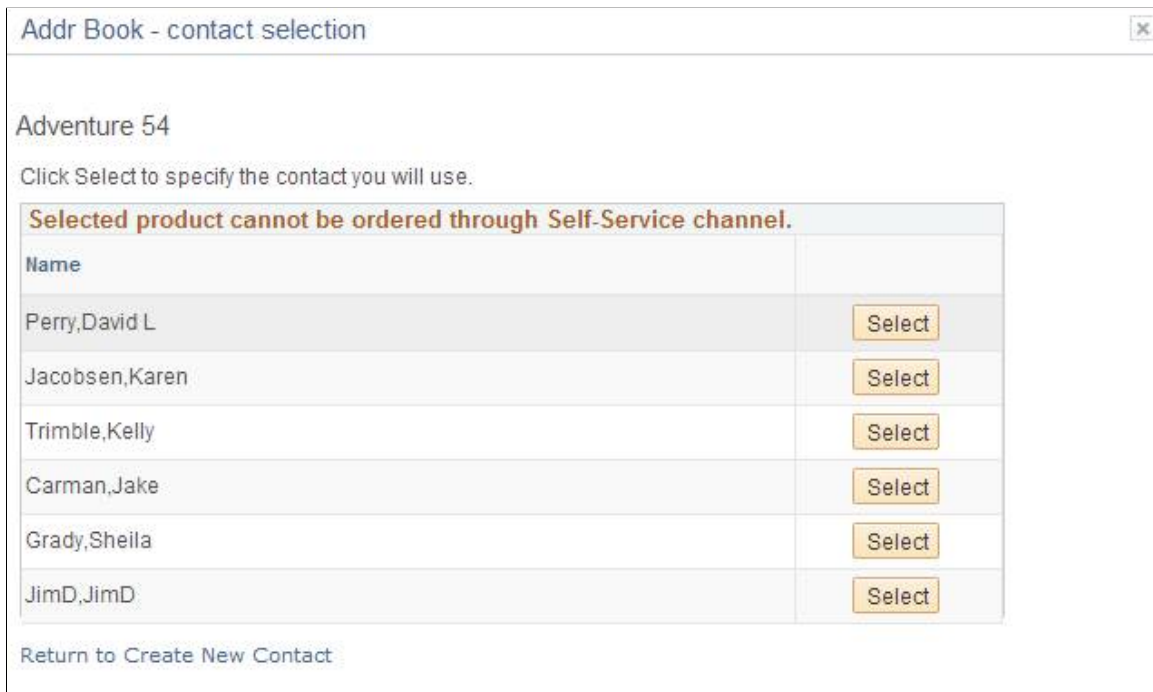
Address Book (New Address) - Select Address Page

Use the Address Book (new address) - Select Address page (RX_ADR_SEL_CUST_DF) to select new primary addresses for the address roles that appear on the Address Book - Customer's Primary Information page and copy the addresses into new address book entries.

Navigation:

- Click a **Replace** link on the Address Book - Customer's Primary Information page.

- Click the **Copy Existing Address** link on the Address Book - Create New Contact page.

This example illustrates the fields and controls on the Address Book (new address) - Select Address page.

Address Book - Contact Information Page

Use the Address Book - Contact Information page (RX_ADR_REP_INFO) to edit an existing contact's information.

Navigation:

- Click the **Edit** link on the Address Book - Customer's Primary Information page.

- Click the **Edit** link on the Address Book - View Contacts page.

This example illustrates the fields and controls on the Address Book - Contact Information page.

If the contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Click **Edit** or **Delete** to maintain the address for the contact-to-customer relationship. Click the **Add New Address** button to enter a new address for this relationship.

Address Book - Update Address Page

Use the Address Book - Update Address page (RX_ADR_CUST_ADDR, RX_ADR_REP_ADDR) to modify existing addresses.

Navigation:

*   Click the **Edit** link on the Address Book - Customer's Primary Information page.

*   Click the **Edit** link on the Address Book - View Addresses page.

*   Click the **Edit** link on the Address Book - Contact Information page for any contact who is associated with one or multiple addresses.

This example illustrates the fields and controls on the Address Book - Update Address page.

```
Address Book - new address

Adventure 54

Enter address changes and Save.
Address Information
            *Address Type  [Business                    ▼]
              *Country  United States
             Address 1  [4655 E 22nd Street             ]
             Address 2  [                               ]
             Address 3  [                               ]
                 City  [Tucson                          ]
               County  [                                ]
                State  [Arizona                      ▼]
               Postal  [85711                           ]
Select roles for how the address will be used. (Check all that apply)
          Address Role:  ☑ Bill To Customer
                        ☑ Ship To Customer
                        ☑ Sold To Customer

You are changing an address which may be associated with more than one person.
[ Save ]   Cancel and Return to Customer's Primary Information
* Required Field
```

This page is almost identical to the Address Book - Create New Address page. Unless you are a contact of a customer, the *Address Roles* are not visible.

Maintaining Consumer Contact and Address Information

This topic lists the pages that consumers use to maintain their contact and address information.

Note: These pages are similar in appearance and usage to the pages that are used to maintain address information for contacts. You must be signed in as a customer to view these pages.

See Maintaining Contact Information.

Pages Used to Maintain Consumer Contact and Address Information

Page Name	Definition Name	Usage
Change Profile Info Page	RX_NAME_SIGNIN	Review and edit name, password, and privacy preferences.
Manage Profile - Default Addresses Page	RX_PROFILE_DFLTS	View and initiate update of the consumer's default contact information, shipping address, and billing address information.
Manage Profile - Contact Information Page	RX_ADR_MY_INFO	Change the consumer's address, phone number, and email address information.
Address Book - Customer's Primary Information Page	RX_ADR_CUST_DFLTS	Review the consumer's primary address, primary billing address, and primary shipping address.
Address Book - Select Address Page	RX_ADR_SEL_CUST_DF	Select a new address of any of the address roles that appear on the Address Book - Customer's Primary Information page.
Address Book - Create New Address Page Address Book - Update Address Page	RX_ADR_CUST_ADDR	Create or update addresses.
Address Book - Delete Confirmation Page	RX_ADR_DEL_CONFIRM	Delete selected address.

Maintaining Consumer Address Books

This topic lists the pages that consumers use to maintain their address books.

Note: These pages are similar in appearance and usage to the pages that contacts use to maintain their address books. Differences in usage are explained below

See Maintaining Contact Address Books.

Pages Used to Maintain Consumer Addresses Books

Page Name	Definition Name	Usage
Address Book Page	RX_ADR_CONSUMER	Review addresses that are associated with the consumer.
Address Book - Update Address Page	RX_ADR_CUST_ADDR	Modify addresses in the address book.
Address Book - Create New Address Page	RX_ADR_NEW_REP	Create addresses in the address book for the consumer.
Address Book - new address - Select Address Page	RX_ADR_SEL_CUST_DF	Select addresses to copy into new address book entries.
Address Book - Delete Confirmation Page	RX_ADR_DEL_CONFIRM	Confirm that you want to delete the address, and select whether to delete it for all users or the current user.

Address Book Page

Use the Address Book page (RX_ADR_CONSUMER) to review addresses that are associated with the consumer.

Navigation:

Manage Profile > **Address Book**

This example illustrates the fields and controls on the Address Book page for a consumer.

Note: In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See Self-Service Page Visibility.

If the address is associated with a contact, the contact's name appears in the name columns. If the address is associated only with a consumer, the consumer's name appears in the name columns.

Address Book - Delete Confirmation Page

Use the Address Book - Delete Confirmation page (RX_ADR_DEL_CONFIRM) to confirm that you want to delete the address, and select whether to delete it for all users or the current user.

Navigation:

Click the **Delete** link on the Address Book page.

When you delete a consumer address that is not associated with a contact, the system displays only the **Yes - Delete** and **No - Do Not Delete** buttons on this page.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Viewing Internal Contacts

This topic discusses how to view internal contacts.

Page Used to View Internal Contacts

Page Name	Definition Name	Usage
Contact Directory Page	WC_CONTACT_DIR	View the names and contact information of people in an organization who are available for customers to contact for assistance.

Contact Directory Page

Use the Contact Directory page (WC_CONTACT_DIR) to view the names and contact information of people in an organization who are available for customers to contact for assistance.

Navigation:

• **Customer Care** > **Internal Contacts** > **Contact Directory**

- **Service Center** > **Internal Contacts** > **Contact Directory** (in the employee portal for Higher Education users).

This example illustrates the fields and controls on the Contact Directory page.

Contact Directory

MMA Property Management Group

Email	Role	Name	Phone	Email
	Accnt Con	Tripper,Elssie P	925/694-2001	crmbptest@yahoo.com
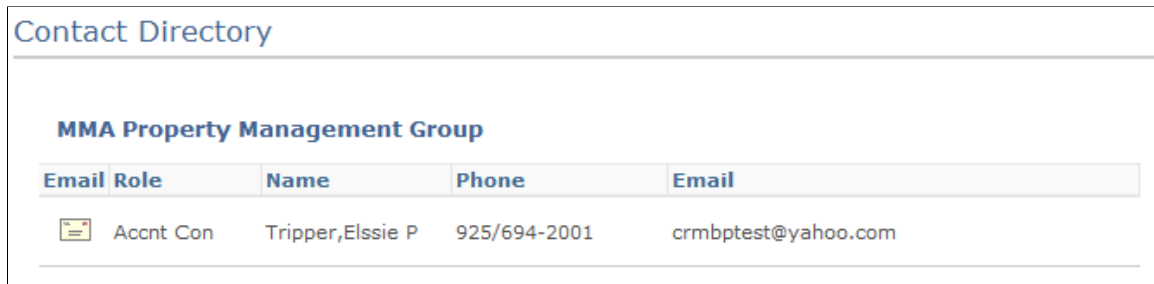
Field or Control	Description
	Click to open your email application to send an email message to the corresponding contact using the listed email address.
Return to Customer Care	Click to return to the parent folder (Customer Care). For Higher Education users to return to the parent folder (Service Center) of the Contact Directory page, use the PeopleTools navigation path link on the top of the page.

Sending Contact Us Messages

This topic discusses how to send Contact Us messages.

Page Used to Send Contact Us Messages

Page Name	Definition Name	Usage
Contact Us Page	WC_CONTACT_US	Self-service users can send messages to your organization.

Contact Us Page

Use the Contact Us page (WC_CONTACT_US) to self-service users can send messages to your organization.

Navigation:

Contact Us > **Contact Us**

This example illustrates the fields and controls on the Contact Us page.

Note: In addition to the self-service application, this page is also available in the employee portal to Higher Education users who are associated with the right role and permission list to access the page.

See Self-Service Page Visibility.

Each subject-topic combination is associated with a workflow action that you specify. The workflow action sends a notification that alerts the recipient to the newly submitted message.

If you use the 360-Degree View feature, the system creates an interaction when the user sends the message. In this situation, the notification normally includes a link to the new interaction.

If the user requests a confirmation email, the system sends a message based on the Contact Confirmation email template. You cannot choose a different template for the confirmation email. You can, however, modify the text of the template.

Live Chat with Agent

Expand this page region and click the **Start Chat** button to initiate a two way chat session with a support agent.

This section appears if the page is chat-enabled on the Chat Enabled Page Setup page.

Related Links

Understanding Customer Self-Service
"Understanding PeopleSoft CRM Workflow" (Automation and Configuration Tools)
"Understanding Self-Service Pagelets" (PeopleSoft Portal Pack)

Registering Products

This topic discusses how to register products.

Pages Used to Register Products

Page Name	Definition Name	Usage
Product Registration Page	RF_PROD_REG_SRCH	Register new or existing products.
Product Registration - Product Registration Details Page	RF_PROD_REG_DET	Enter product registration information.

Product Registration Page

Use the Product Registration page (RF_PROD_REG_SRCH) to register new or existing products.

Navigation:

Product Registration > **Product Registration**

This example illustrates the fields and controls on the Product Registration page.

The **Product Catalog** group box lists the catalogs that you can use for product registration. Depending on how a catalog is set up, you can view a simple list of products, a list of product categories, or both. Regardless of whether you need to browse through different levels to find a product, click a product link to access the Product Registration - Product Registration Details page and submit the product registration.

Note: In addition to registering products in PeopleSoft CRM self-service, users can also contact CSRs, who can register products for customers through the 360-Degree View.

Related Links
Understanding 360-Degree View Setup
Understanding the 360-Degree View

Product Registration - Product Registration Details Page

Use the Product Registration - Product Registration Details page (RF_PROD_REG_DET) to enter product registration information.

Navigation:

Click a product link in the **Your Existing Products** group box or the **New Product** group box (after locating the product from product catalogs) on the Product Registration page.

This example illustrates the fields and controls on the Product Registration Details page.

The **Registration** group box displays the name of the product that you selected from the catalog, as well as the installed product fields that you selected during setup to appear for product registration purposes.

Administrators can define the fields that appear on this page by using the Product Registration Setup page. Modify these fields for a specific product on the Installed Product page in the Product Definition component. Also, when defining these fields, you can specify whether a user can modify the field value on existing installed products.

In this example, self-service users can enter the serial ID, purchase date, site, location details, and comments for the registration. When the product registration is submitted successfully, the system displays a record of it with the date of registration in the **Your Existing Product** group box. The system updates the associated installed product with the information that the user entered during product registration. If it is a new product, the system creates an installed product with a status of *Installed*.

Field or Control	Description
Submit	Click to submit and save the product registration. The system automatically populates the registered date with the current system date when you submit the registration.
Cancel and Return	Click to return to the Product Registration page.

Chapter 22

Working with Contacts

Understanding Contact Management

Contact management enables salespeople (or relationship managers) to manage contacts, tasks, and calendars across all of their accounts by using an easy and intuitive user interface. Relationship managers can:

- Add system contacts to their list.

- Create and manage contact groups.

- Send an email message to selected contacts.

- Create tasks, schedules, and call reports for selected contacts.

This feature focuses on shared contacts. The contacts entered and viewed are enterprise contacts and do not include a user's personal contacts or contacts that are private in any manner. This means that all users can access the contacts and can add the same contacts to their list.

To add private data for a contact that is visible only to you, use the user-defined fields within the Person component.

See "Understanding Persons" (Business Object Management).

Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees and what took place during the event.

Contact Management Toolbar

PeopleSoft CRM provides a toolbar that is on every Contact Management page. This toolbar enables you to transfer between Contact Management pages and perform commonly used actions for your contact list. You can also access accounts, tasks, and calendars by using the toolbar.

Related Links

"Leads and Opportunities" (PeopleSoft Sales)
Understanding Task Management
Understanding Calendars

Managing Contacts

This topic discusses how to:

- Access contacts.

- Enter additional filtering criteria.

- Modify columns that appear on the contacts list.

- Personalize the search filter.

- Add existing contacts to the contacts list.

- Add contacts to the system.

Pages Used to Manage Contacts

Page Name	Definition Name	Usage
My Contacts Page	RD_CONTACTS	Access contacts to perform various actions for the contacts.
Personalize Filter Settings Page	RB_FILTER_PERS	Configure settings for contact search.
Notification Page	RD_EMAIL_CNTCT	Send an email notification to selected recipients and members of selected contact groups on the Outbound Notification page.
My Contacts - Search Contacts Page	RD_IMPORT_CONTACTS	Search for contacts that are already defined in the system and select one or more to add to the My Contacts list.
Remove Contacts Page	RD_REMOVE_CNTCT	Remove one or more contacts from the My Contacts and all contact groups to which the contact belongs.
Person Page	RD_PRSN_PRIMARY	Add a contact to the system.

My Contacts Page

Use the My Contacts page (RD_CONTACTS) to access contacts to perform various actions for the contacts.

Navigation:

My Contacts

This example illustrates the fields and controls on the My Contacts page.
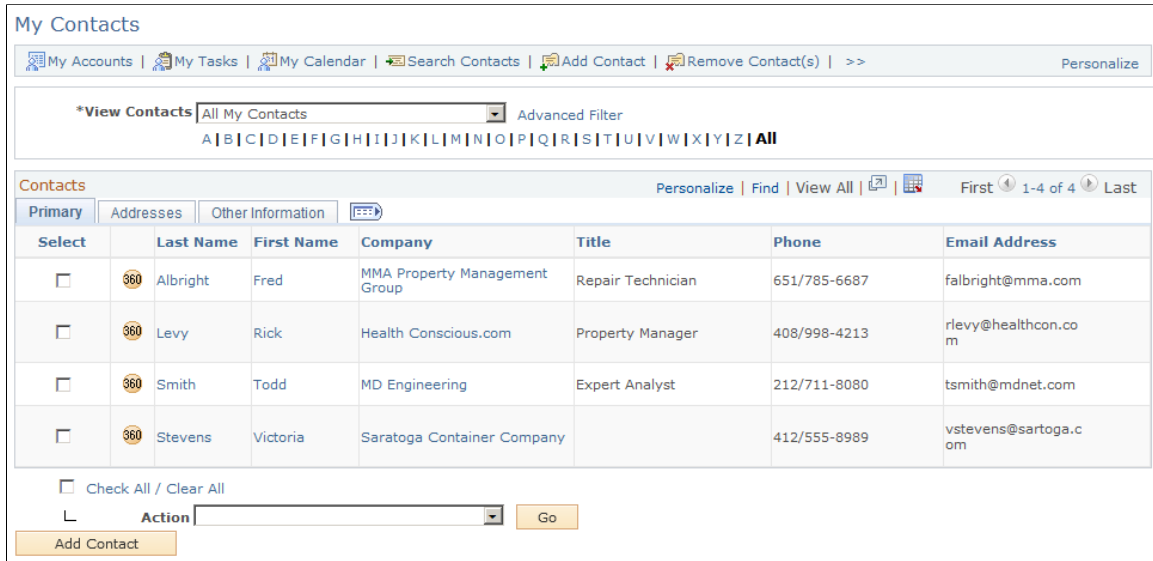
Use the letters that appear below the **View Contacts** field as an index to select the starting letter of the contact names to view. You can modify the way the index appears: for example, you might define the index letters as *A-C, D-F,* and so forth.

See Defining Alpha Indexes.

Field or Control	Description
View Contacts	Select a contact group to view.
Advanced Filter	Click this link to enter additional criteria by which you can filter the contact list.
Select	Select one or more contacts for which to perform a specified action.
Check All / Clear All	Select to select all listed contacts or to clear all selected contacts. **Note:** This option selects or clears only the contacts on the page that currently appears.

Field or Control	Description
Action	Select the action to perform for the selected contacts. For example, if you select *Email Contact(s),* then the system displays an email page that is pre-addressed to all of the selected contacts. Actions are: • *Add Call Report for Contact(s)* • *Add Contact(s) to Group* • *Add Task for Contact(s)* • *Email Contact(s)* • *Remove Contact(s)*

Security Considerations

The system provides safeguards against users viewing contact information for which they are not authorized:

• For users that do not have access to all companies that are defined in the system, the company column is blank.

• For users that do not have access to worker information, the worker home phone and worker home address columns are blank, even if they are visible to other users.
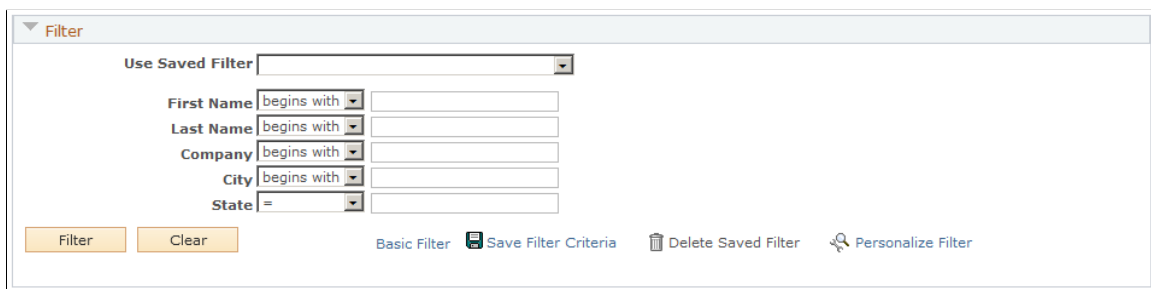
Advanced Filter Section

The default search filter is a basic one. However, you can enter criteria for a more advanced contact search.

Navigation:

Click the **Advanced Filter** link (beside to the**View Contacts** field) at the top of the My Contacts page, to toggle from the (default) basic filter to the advanced filter section.

This example illustrates the fields and controls on the My Contacts: Search page - Advanced Filter section.

Enter one or more search criteria to filter the results by the criteria entered.

Note: Unless the signed-on user has access to all companies, they aren't able to search for a contact based on the company criteria.

Field or Control	Description
Show in Results	Select one or more roles to display only contacts for which you have the selected role(s). For example, select *View as Account Owner* to show only the contacts for customers where you are the account owner.
Personalize Filter	Click this link to access the Personalize Filter Settings page where you can configure settings for the contact search.

Personalize Column and Sort Order Popup Window

Use the Personalize Column and Sort Order popup window to manage your search results display (column appearance and sort order).

Navigation:

Click the **Personalize** link in the Contacts section title bar (beside the Find and View All inks) on the My Contacts page.

This example illustrates the fields and controls on the Personalize Column and Sort Order popup window.
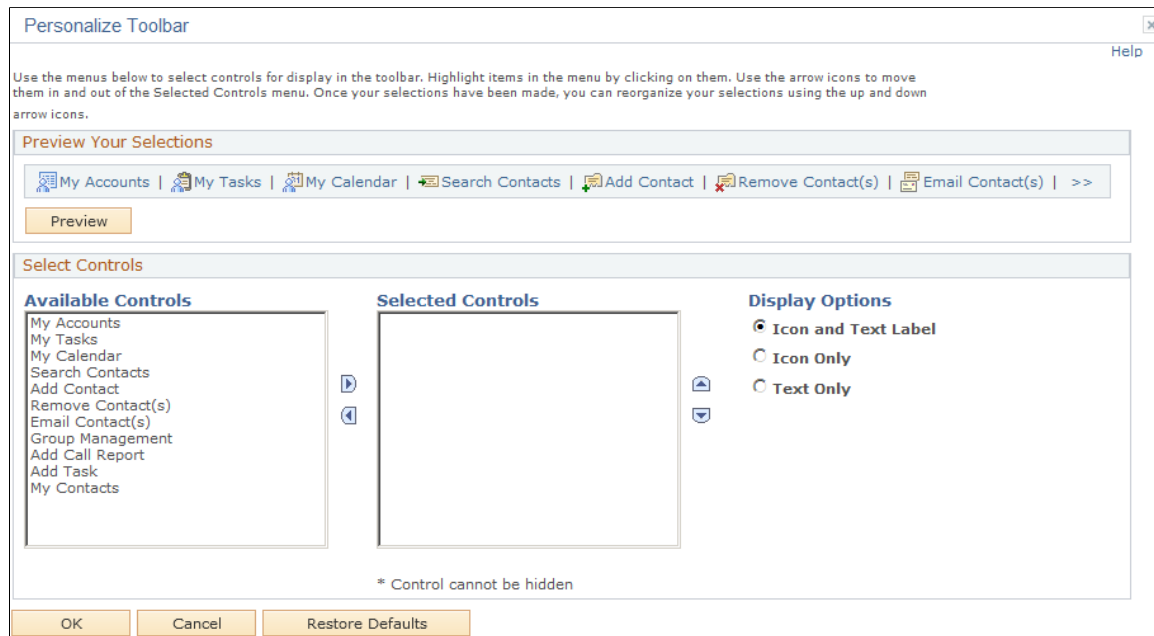
The columns that appear on the My Contacts list are shown in the **Column Order** list box. You can select a column and rearrange its order, hide it, or use it as a sort column.

Some predefined columns (*Home Address, Address, State, Postal, Employer, Cell Phone,* and *Home Phone*) are not included in the column order and sort order that appear on this page. To set up the contact list so that you can view those columns, click the **Personalize Filter** link on the Advanced Filter page.

Personalize Filter Settings Page

Use the Personalize Filter Settings page (RB_FILTER_PERS) to configure settings for contact search.

Navigation:

Click the **Personalize Filter** link near the bottom of the My Contacts page when the advanced filter section is enabled.

Note: The Personalize Filter link appears on the My Contacts page only when the advanced filter in enabled.

This example illustrates the fields and controls on the Personalize Filter Settings page (1 of 2).

This example illustrates the fields and controls on the Personalize Filter Settings page (2 of 2).

The Personalize Filter link is available in the Filter section that appears when you click the Advanced Filter link on the My Contacts page.

My Contacts - Search Contacts Page

Use the My Contacts - Search Contacts page (RD_IMPORT_CONTACTS) to search for contacts that are already defined in the system and select one or more to add to the My Contacts list.

Navigation:

Click the **Search Contacts** link on the My Contacts toolbar.

This example illustrates the fields and controls on the Search Contacts page.

This page initially appears with only the search fields visible. The results of the search appear in the contacts list. You can select one or more contacts to add to the My Contacts list.

You can also add contacts to the contact list from the contact list from these components:

• 360 Degree View

• Person

• Company

• Site

To automatically insert contacts to the contact list, specify *Yes* in the **Auto Insert to My Contacts** field that is available on the Sales page of the User Preferences component.

If this flag is set to *Yes* for a user, a user can click the **Add to My Contacts** toolbar button on the Company, Site, Person, Lead, or Opportunity components to add contacts on that component to the user's My Contacts list.

Contacts of a customer (company or consumer) are added to the customer account owner's and team members' contact lists. Contacts of a company's child companies can be added to the account owner's contact list. Contacts of leads and opportunities can also be added to the contact lists for the lead or opportunity team members.

Related Links

Sales Page

Person Page

Use the Person page (RD_PRSN_PRIMARY) to add a contact to the system.

Navigation:

Click the **Add Contact** link on the My Contacts toolbar.

This example illustrates the fields and controls on the Person page.

When you access the Person page from the contact management toolbar, any contact that you add to the system is automatically added to your contact list.

Related Links

"Understanding Persons" (Business Object Management)

Maintaining Contact Groups

This topic discusses how to maintain contact groups.

Pages Used to Maintain Contact Groups

Page Name	Definition Name	Usage
Group Management Page	RD_GROUP_MGT	Manage contact groups.
Group Selections Page	RD_CNTCT_GRP	Add or remove contacts of a contact group.
Group Information Page	RD_GROUP_MGT	Maintain groups and group membership.

Group Management Page

Use the Group Management page (RD_GROUP_MGT) to manage contact groups.

Navigation:

Click the **Group Management** link (scroll to the right) in the Contacts toolbar on the My Contacts page.

This example illustrates the fields and controls on the Group Management page.

Field or Control	Description
Group Name	Click a listed group to open the Group Information page for the group.
Add a Group	Click this button to access the My Contacts - Group Information page and add group details and members to the group.

Group Selections Page

Use the Group Selections page (RD_CNTCT_GRP) to add or remove contacts of a contact group.

Navigation:

With one or more contacts selected on the My Contacts page, select *Add Contact(s) to Group* in the **Action** field. Click the Go button.

This example illustrates the fields and controls on the Group Selections page.

Field or Control	Description
Select	Click this button to access the Group Information page where you can add or remove contacts of the group.

Group Information Page

Use the Group Information page (RD_GROUP_MGT) to maintain groups and group membership.

Navigation:

With at least one contact selected, select *Add Contact(s) to Group,* and click **Go.**

This example illustrates the fields and controls on the Group Information page.

To add a member to the current group, enter first and last names of the contact and click the **Select** button. If more than one matching contact is returned, the system takes you to the Search for Contact page where

a list of contacts with names beginning with the characters you entered are displayed. Select one or more contacts and click the **Select** button to add them to the current contact group.

Chapter 23

Working with Tasks

Understanding Task Management

Task management enables users to plan and manage the day-to-day activities that are associated with managing sales, service, and support activities.

Tasks are associated with workflow items that are triggered by PeopleSoft CRM transactions, such as leads and opportunities. If a transaction triggers a workflow item that assigns a task to a user, than that task appears in the user's task list and the user's calendar. If the task is for a meeting, the task appears in the user's meeting list. You access task lists, calendars, and meeting lists using the My Tasks and My Calendar pages.

Users can access their task list directly from the left-hand menu or by clicking a toolbar button that is available on the My Contacts and My Calendar pages. Additionally, users can view tasks that are associated with a transaction or component.

You can create tasks from these components.

- Lead

- Opportunity

- Change Management

- Case

- Service Order

Details of a task that appear on the My Tasks, My Calendar, or My Meetings page are available by clicking the task name.

Task Types

PeopleSoft CRM provides these task types when the application is first installed:

- All Day Event

- Appointment

- Change Activity

- Change Approval

- Change Meeting

- Holiday

- Follow-up

- Meeting

- Phone call

- Reminder

- Service Order

- Summary

- To-do

You can also set up additional task types.

See <u>Setting Up Task Management</u>.

Task Management Process

A task owner creates a task and assigns it to one or more persons. A notification is then sent to each of the assignees that a task is assigned to them, and the task appears in the assignee's task list. The assignee can either accept or decline the task. The owner is notified when the assignee marks the task as completed.

The task owner can reassign a task for any of the assignees. An assignee can reassign a task that is assigned to them. When a task is reassigned, the system sends a notification to the new assignee that the task is assigned to them. When the new assignee accepts or declines the task, the system notifies the owner.

This diagram shows the task management process:

This diagram shows the task management process.
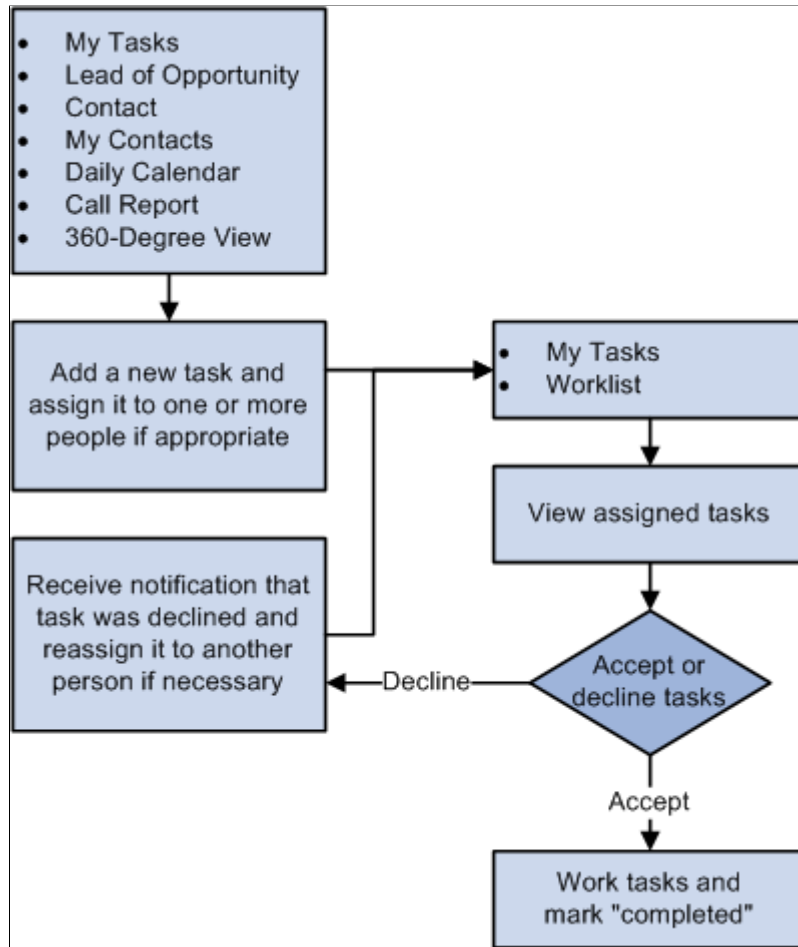
Personal Information Managers

You can synchronize tasks between the PeopleSoft CRM database and personal information management (PIM) systems such as Microsoft Outlook and Lotus Notes.

See your current Infosync Server documentation for more information.

Task Folders

Users can organize their tasks using folders. Five standard folders are available; users can additionally create their own personal folders. Personal folders are used only for entries from a user's individual set of tasks, not for tasks from a group or from a user's direct reports. Clicking a folder name displays the contents of that folder. A yellow highlight indicates the currently selected folder.

These are the standard folders:

- The *My Tasks* contains all tasks owned by or assigned to the user that have not been moved to another personal folder

- The *All My Tasks* folder is a combination of *My Tasks* and other user-defined (personal) folders. It contains the tasks that appear under *My Tasks* and all user-defined folders.

  It does not include items from the Group Tasks, Direct Reports, or My Sales Team folders.

- The *Group Tasks* folder contains tasks that are owned by a provider group without an individual owner. Only entries from the provider groups to which the user belongs are shown.

  This folder appears only if the user belongs to at least one provider group.

- The *Direct Reports* folder contains the tasks owned by, assigned to or delegated to direct reports. By default, the tasks of all the direct reports along with their delegated tasks will show up under this folder

  This folder appears only if the user has direct reports. The Direct Reports folder will not, however, show the user's personal tasks.

  When viewing the Direct Reports folder, users have access to a drop-down list box for selecting a specific employee and filtering the task entries accordingly.

- The *My Sales Team* folder contains the tasks owned by, assigned to or delegated to members of your sales team.

  This folder appears only if the user is the leader of a sales team (as defined by the Territory Tree).

  When viewing the My Sales Team folder, users have access to a drop-down list box for selecting a specific employee and filtering the task entries accordingly.

- The *Delegated* folder contains any tasks that have been delegated to that user. Delegation of a user's tasks is defined on the Task Options page.

Users can create, rename, and delete personal folders at will. However, if a user attempts to delete a folder that is not empty, an error message tells the user to move the folder contents elsewhere (to another personal folder or to the inbox) first.

Note: The **My Tasks, All My Tasks, Group Tasks, Direct Reports, My Sales Team,** and **Delegated** folders cannot be deleted or renamed

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The toolbar on the My Tasks page includes a button that a user clicks to display the number of items in each folder. The folder count appears in parentheses next to the folder name. The system, however, does not provide folder counts for the Group Tasks, My Sales Team, Direct Report, or Delegated folders. For performance reasons, the folder counts are *not* updated continuously.

By default, the system hides folder counts when the page first appears. After they are displayed, however, they remain visible as long as the user remains on the page. To hide folder counts, users must navigate to the My Tasks page again.

Important! Folder counts are only as current as the most recent time that the user clicked either the **Folder Counts** toolbar button or the **Refresh** toolbar button.

Related Links

"Leads and Opportunities" (PeopleSoft Sales)

"Understanding the Company Component" (Business Object Management)

"Understanding Persons" (Business Object Management)

Setting System-Wide Security Options

Understanding the 360-Degree View

Setting Up Task Management

To set up task management, use the Task Priority (RB_TSK_PRIORITY) and Task Type (RB_TSK_TYPE) components.

This topic lists the pages used to set up task management.

Note: Your PeopleSoft Application Administrators can control and modify access to all PeopleSoft CRM pages, including those that are used for Task Management, through the standard PeopleTools security using roles, permission lists, and user IDs. Documentation for this security administration is provided in *PeopleTools: Security Administration* product documentation.

Pages Used to Set Up Task Management

Page Name	*Definition Name*	*Usage*
Task Type Page	RB_TSK_TYPE	Define task type codes that enable the user to categorize tasks.
Task Priority Page	RB_TSK_PRIORITY	Define task priority codes that enable the user to designate a priority for tasks.
Task Group Template Page	RB_TSK_GRP_TPL	Define task group templates and task durations.
Clone Template Page	RB_CLONE_TXN_SEC	Specify a new template name to be created from the current template.
Reset SYNCIDs Page	RB_TSK_SR	Reset invalid sync IDs between tasks and their corresponding CRM transactions.

Task Type Page

Use the Task Type page (RB_TSK_TYPE) to define task type codes that enable the user to categorize tasks.

Navigation:

Set Up CRM > **Common Definitions** > **Task Management** > **Task Type** > **Task Type**

This example illustrates the fields and controls on the Task Type page (1 of 2).

This example illustrates the fields and controls on the Task Type page (2 of 2).

Task Type

The options you select on this page control the options that are available on the Task Detail page.

Field or Control	Description
Task Type	Enter the type of the task.
Application Usage	Select the application where the task type is used. A value of *All Applications* indicates a universal type that is available to all applications.
Active	Select to make the task type active. Users can only create tasks for active task types.

Field or Control	Description
To Accept Task	Select to indicate whether all of the assignees need to work on the task or only one assignee needs to work on the task when the task is assigned to multiple people.
Pencil In (Mark as free Time)	Select to indicate that the task duration is not treated as busy time by the Assignment Engine.
Record Attendance	Select to enable recording of attendance. If this is selected, the Task Details page shows a column of check boxes in the **Invitee/Assignee** grid for users to indicate whether the **Invitee/Assignee** attended the meeting. This check box is usually selected for meeting task types.
Show Repeating Options	Select to enable the user to select the frequency and time period in which this task repeats.
Do not show in Calendar	Select to suppress the task from the user's calendar. This option is cleared by default. **Note:** The task appears in the user's calendar only if this option is cleared *and* the user enters a start and end date and time for the task.
Show Assigned to Grid and **Label for Assigned to Grid**	Select to have the assigned to grid appear on the Task Detail page. If you select **Show Assigned to Grid,** then the **Label for Assigned to Grid** field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays *Assigned To.* This value comes from the message catalog.
Show Invitation Type	Select to have the **Invitation Type** column appear in the **Invitees** grid on the Task Detail page.
Show Contacts Grid and **Label for Contacts Grid**	Select to have the contacts grid appear on the Task Detail page. If you select **Show Contacts Grid,** then the **Label for Contacts Grid** field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the system displays *Contacts.* This value comes from the message catalog.

Field or Control	*Description*
Label for Assign Button	Select a value to change the label for the **Assign Button** that appears on the Task Details page. By default, the system displays *Assign.* This value comes from the message catalog.
Show Task in Task List	Select to have the task appear in the task list for the task owner and all assigned users. **Note:** Do not select this option for the Task Type of *Service Order*, since Service Order activities should be viewed and updated directly from the Service Order component, not from the Task List.
Show Provider Group	Select to have the **Provider Group** field appear in the Task Details page.
View or Link Transactions	Select to have the **View or Link Related Objects** link appear on the Task Detail page when the user adds a task of this type. **Note:** Do not select this option for the Task Type of *Service Order*, since the link has not been designed to work on the **Task Detail** page for that Task Type.
Calendar Image	Enter the name of the image that identifies the task type in the task list and calendar.

See "Using PeopleTools Utilities" in *PeopleTools: System and Server Administration* product documentation.

Field Display Options

Field or Control	*Description*
Start Date Required, End Date Required, Start Time Required, End Time Required, and **Location Required**	Select the fields that are required for this task type.
Start Date Visible, End Date Visible, **Start Time Visible, End Time Visible,** and **Location Visible**	Select the fields that are visible for this task type. If you indicate that a field is required, you must also indicate that it is visible. However, a field can be visible but not required.

PIM Integration Options

This section is not used by the CRM system.

Task Priority Page

Use the Task Priority page (RB_TSK_PRIORITY) to define task priority codes that enable the user to designate a priority for tasks.

Navigation:

Set Up CRM > **Common Definitions** > **Task Management** > **Task Priority** > **Task Priority**

This example illustrates the fields and controls on the Task Priority page.

Field or Control	Description
Code	Enter a code to identify the task priority.
Default	Select one priority as the default for all tasks.
Active	Select to indicate that this task priority is active. Only active priorities are available to assign to tasks.
Image Name	Select the image that represents the priority visually. If defined for a task priority, the image appears on the My Tasks list for each task that has that priority.

Related Links
Task Details Page

Task Group Template Page

Use the Task Group Template page (RB_TSK_GRP_TPL) to define task group templates and task durations.

Navigation:

Set Up CRM > **Common Definitions** > **Task Management** > **Task Group Template** > **Task Group Template**

This example illustrates the fields and controls on the Task Group Template page: Type tab.

Task group templates ensure that all tasks that must be completed to accomplish the goal that is assigned. For example, the task group Install Hardware might consist of three tasks: Installation, Test Install, and Installation Acceptance. This is particularly useful when the tasks are performed by different people with different reporting relationships.

When a user schedules a task group, the task group template creates and assigns each task within the group.

Task Group

Field or Control	Description
Active	Select to activate the group template.

Field or Control	Description
Application Usage	Select the application or component for which the group template can be used. Values are: • *All Applications* • *Change Management* • *Field Service* • *HR Helpdesk* • *HelpDesk* • *Higher Education* • *Lead* • *Marketing Events* • *Opportunity* • *Personal Information Mgmt* (personal information management) • *Sales* • *Support* **Note:** If you select *Change Management, HelpDesk, HR HelpDesk,* or *Support* the system displays the **Duration** tab. You can use this page to enter offset days, duration days, and start and end times. For *Change Management,* you enter only days, hours and start use codes.

Task Group Template - Type

Use this section to add tasks to the group template. For each task, specify default values that pertain to the selected usage: task type, priority, task name (subject), provider group, task owner, assignee, location, and task description (for *Change Management, HR Helpdesk, HelpDesk* and *Support*). These values appear as default when the corresponding group template is selected at runtime and are can be updated.

Note that the **Provider Group** column will only be visible and editable on a row if the corresponding **Task Type** definition has been configured to show this field.

Note: If the default task owner and assignee are not specified in the task group template, at runtime, the logged on user becomes the default task owner and no assignees are pre-populated. The owner can update task information, add and delete task entries as necessary.

Duration

This example illustrates the fields and controls on the Task Group Template page: Duration tab.

Use this tab on the Group Template page to specify a duration for each task. If the task type requires a start or end time (for example, meetings), you must enter these fields. The specific fields that appear on this page are dependent on the task type. This tab appears only when you select *Change Management, HelpDesk,* or *Support* from the **Application Usage** field.

Field or Control	Description
Offset Days	This field appears only if you selected *HelpDesk,* or *Support* in the **Application Usage** field. Enter the number of days that are added to the plan start date to derive the task start date. The task end date is derived from adding the Duration Days to the task start date.
Duration Days, Start Time and **End Time**	Enter the number of days a task should take as well as the start and end times for each task.
Start Use Code	This field appears only if you selected *Change Management* in the **Application Usage** field. Select one of these values to indicate when a task should start: • *Current Phase Start* • *Next in Sequence* • *Prior Phase Start* • *Prior Task Start*

Reset SYNCIDs Page

Use the Reset SYNCIDs page (RB_TSK_SR) to reset invalid sync IDs between tasks and their corresponding CRM transactions.

Navigation:

Set Up CRM > **Common Definitions** > **Task Management** > **Reset SYNCIDs**

This example illustrates the fields and controls on the Set SYNCIDs page.

Use this page to reset invalid sync IDs of the specified type of transactions. Task management uses sync IDs to associate tasks and CRM components from which these tasks are created.

Warning! In PeopleSoft CRM, sync IDs are used as unique foreign key references to transactions. If you must reset sync IDs, use this page instead of the PeopleTools' Set Sync IDs utility.

Field or Control	*Description*
Transaction Type	Select the type of transactions you want to reset the sync IDs.
Record (Table) Name	Enter the name of the record containing the sync IDs that you want reset for the specified transaction type. For example, if you select *Lead* as the transaction type, enter RSF_LEAD as the record (table) name. For the *Opportunity* transaction type, enter RSF_OPPORTUNITY as the record (table) name.
Reset All SyncIDs	Select to assign a new sync ID (a value that is greater than zero) for each transaction of the selected transaction type, regardless of whether the transaction currently has a sync ID, or the sync ID is a valid one. If this option is clear, the system only resets invalid sync IDs, which are either null or zero in value.
Reset	Click to start the sync ID reset process.

Managing Tasks

This topic lists common elements and discusses how to manage tasks.

Pages Used to Manage Tasks

Page Name	Definition Name	Usage
My Tasks Page	RB_TSK_MY_TASKS	View the list of tasks that are assigned to you. You can select a task and view its details or add a task.
My Tasks - User Options Page	RB_TSK_PREF_SEC	Set defaults for tasks that you create and for how the My Tasks list appears.
Task Details Page	RB_TSK	Create a task or update task details.
Task Repeating Options Page	RB_TSK_REPEAT_SEC	Specify the frequency with which a task repeats. This page is accessible only if you select the **Show Repeating Options** check box for the task type on the Task Type page.
My Tasks - Notes Page	RB_TSK_NOTE	View or add notes to a task.
Related Objects for the Task Page	RB_TSK_TXNS	Link related transactions to a task.

Common Elements Used in Managing Tasks

Field or Control	Description
History	The History drop-down list box displays a list of the task management pages that you accessed during the current session. Select a listed page to transfer to that page.

My Tasks Page

Use the My Tasks page (RB_TSK_MY_TASKS) to view the list of tasks that are assigned to you.

You can select a task and view its details or add a task.

Navigation:

My Tasks > **My Tasks**

This example illustrates the fields and controls on the My Tasks page.
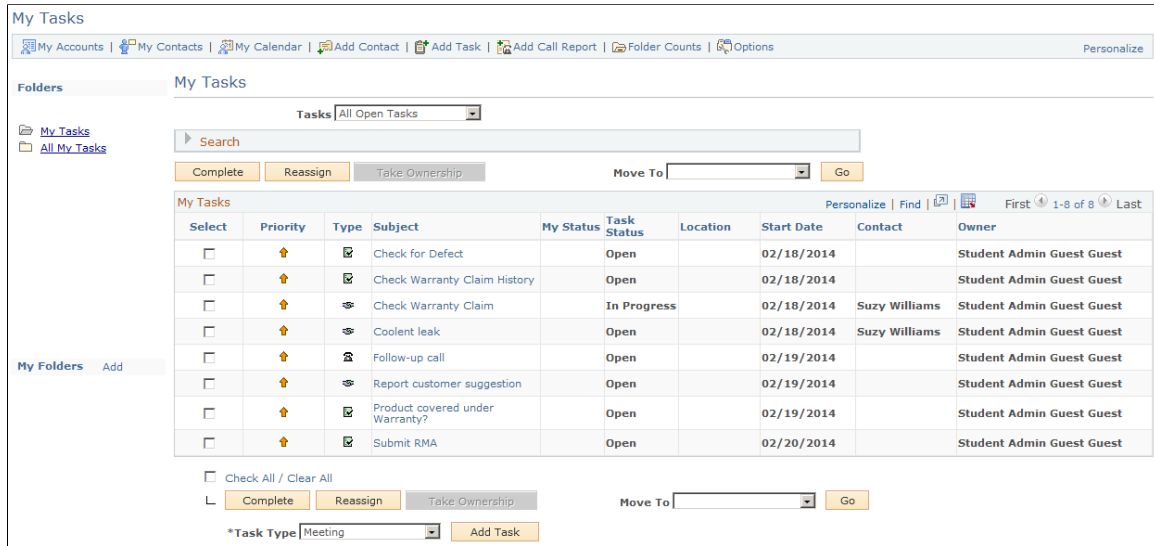
Note: The My Tasks component has its custom setup for populating the grid with tasks and meetings, and it does not support the automatic grid population options that are available in the Configurable Search Setup (RB_FILTER_DEFN) component. The only grid initialization option that the My Tasks component supports is *Do not populate the grid,* which is also its default option.

When you access the My Tasks page, items of the grid are displayed based on the default filter that appears in the **Tasks** field. When you select a different filter, the system populates the grid with items that meet the new filter criteria.

Toolbar

Field or Control	Description
	Click to show the number of active tasks in each personal folder. The folder count appears as a number in parentheses after the folder name. Folder count values will only be recalculated when this button is clicked. Folder counts do not appear for the *Group*, *Direct Reports*, *My Sales Team,*or *Delegated* folders.
	Click to access the My Tasks - User Options page, where you can choose the default filter, default folder, and transaction type for the task list, or delegate your tasks.

Formatting Conventions for Folders

Folder names have these formatting conventions:

• Orange highlight indicates the currently selected folder.

- Click the **Folder Counts** toolbar button to display task counts for folders. A number in parentheses after the folder name indicates the total number of active tasks in the folder. Folder counts will only be updated by clicking the **Folder Counts** toolbar button.

  If you move the cursor over the folder name, pop-up text lists the number of unread entries in addition to the total number of entries.

Folders

Field or Control	Description
My Tasks	Click to display task entries owned by or assigned to the user that have not been moved to other folders. You can move task entries into personal folders from the My Tasks view. You can also move tasks from any previously created personal folder back to the My Tasks folder or to another personal folder.
All My Tasks	Click to display all task entries from the **My Tasks** folder and any personal folders that you have created.
Direct Reports	Click to display only the task entries of your direct reports (as defined on the worker record). This folder appears only if the current user has direct reports. When you use the direct reports view of your task list, the **Direct Report** drop-down list box appears so that you can further filter the list to display only entries for a specific person whom you supervise, or for all direct reports at once.
My Sales Team	Click to display only the task entries of your sales team. This folder appears only if the current user is a sales manager (as defined by the Territory Tree). When you use this view of the task list, the **Team Member** drop-down list box appears so that you can further filter the list to display only entries for a specific person on your team, or for all team members at once.
Group Tasks	Click to display only task entries that are associated with a provider group to which you belong. This folder appears only if the current user belongs to at least one provider group. When you use the group tasks view of your task list, the **Provider Group** drop-down list box appears so that you can further filter the task list to display only entries for a specific provider group to which you belong, or for all provider groups at once.

Field or Control	Description
Delegated	Click to display only task entries that have been delegated to you. This folder appears only if you have task items delegated to you from other users. When you use the delegated view of your task list, the **Delegator** drop-down list box appears so that you can further filter the task list to display only entries for a specific person whose tasks have been delegated to you.

My Folders

Field or Control	Description
Add	Click to access the My Tasks - Add Folders page, where you can name and create a new personal folder.
Edit	Click to access the My Tasks - Manage Folders page, where you can rename or delete a personal folder. Note that you cannot delete a folder that contains one or more active (open) tasks. This button only appears if you there is at least one personal folder to manage.
<Folder Name>	Click to view the contents of a personal folder.

My Tasks

The task priority indicator appears as a column on the left of this grid if the default priority is not assigned to the task. The task type icon appears in the column immediately to the left of the subject column.

See Task Priority Page, Task Type Page.

Use the following field to filter which tasks should be included in the search results:

Field or Control	Description
Tasks	Select a filter to view only tasks that meet the filter criteria. The available filters are: • *All Open Tasks* • *Meetings This Week* • *Meetings Today* • *Overdue Tasks* • *Tasks This Month* • *Tasks This Week* • *Tasks Today* • *Tasks Tomorrow* By default, all open tasks, appointments, and meetings appear in the task list. You can click the **Options** button to select a different default filter.

The search results (task list) grid displays the relevant tasks that fit the filter criteria for the search that has just been executed, and includes these fields:

Field or Control	Description
Priority	Displays the task priority
Type	Displays the task type of the task.
My Status	Indicates whether the task is assigned to you and whether you accepted or rejected the task.
Task Status	Indicates the task status.
Contact	Displays the primary contact for the task or meeting.
Owner	Displays the task owner.

In addition to the search results, the following actions may be performed on any of the search results:

Field or Control	Description
Complete	Click this button to complete the selected task(s).
Reassign	Click this button to reassign the selected task(s).
	This button is enabled in all folders except the Group Tasks folder. Before a Group Task can be reassigned, one of the group members must take ownership.
Take Ownership	This button is only enabled when viewing the Group Tasks folder. When clicked, it will set the task owner to the currently logged in user.
Move To, **Go**	Move the selected task(s) to any other personal folder (**My Tasks** or any user-defined folder).
	The **Move To** drop down list and corresponding **Go** button are only visible when in **My Tasks** or other personal folders.

A new task may be created by using the following fields:

Field or Control	Description
Task Type	Select a task type for the task you wish to add.
Add Task	Click to add a task of the selected type.

Search

Expand the **Search** region of the My Tasks page.

This example illustrates the fields and controls on the My Tasks page [search area].
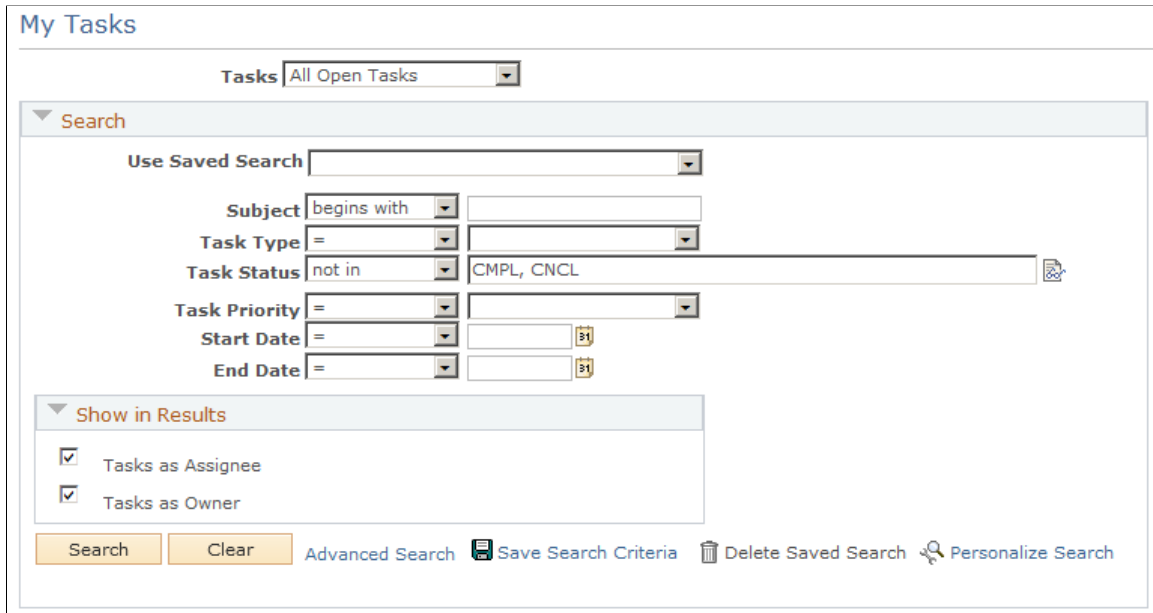
Enter one or more search criteria to filter the results by the criteria entered. To modify the columns that appear in the **My Tasks** grid, click the **Personalize Filter** link. On the Personalize Search Settings page, select or clear the check box for the appropriate column.

Field or Control	Description
Task Status icon	Click to display a list of task statuses. Choose one or more statuses to filter the task list by those statuses.
Show in Results	Select one or more roles to display only tasks for which you have the selected roles.
Personalize Filter	Click to access the Personalize Search Settings page, where you can modify the columns that appear on the **My Tasks** grid.

My Tasks - User Options Page

Use the My Tasks - User Options page (RB_TSK_PREF_SEC) to set defaults for tasks that you create and for how the My Tasks list appears.

Navigation:

My Tasks

Click the **Options** toolbar button in the My Tasks component.

This example illustrates the fields and controls on the My Tasks - User Options page.

Use this page to personalize how tasks and calendar items appear in the My Tasks component and to set defaults for tasks that you create. The **Default Filter** option controls which tasks appear in the task list when you first access the component.

Note: You can also set these defaults under **My Personalizations** > **General Options.**

My Tasks

Field or Control	Description
Default Filter	Select the filter to determine the type of transaction that you want to see when you first access your task list for a particular browser session.
Default Folder	Select the folder that you want to see when you first access your tasks for a particular browser session.

Note: Changes to either of these settings will only appear on the My Tasks page after logging out and back into the system.

Delegates

Use the **Delegated By [Name]** grid to delegate your task entries to another worker or to a provider group for a specified period of time. Supervisors may also delegate the task entries of their direct reports. When

tasks are delegated to another worker, he or she will see your tasks in the **Delegated** folder on his or her My Tasks page.

Field or Control	Description
Start Date	Specify the start date for task delegation.
End Date	Specify the end date for task delegation.
Task List	Indicate the task list whose items you wish to delegate. **Note:** This field only appears for supervisors, and allows them to define delegation of their own tasks, the tasks of one of their direct reports, or the tasks of all of their direct reports.
Delegate Type	Indicate if you are delegating tasks to a provider group or to an individual.
Name	Specify the name of the provider group or of the individual to whom you wish to delegate the tasks.
Task Type	Indicate the task type that you wish to delegate.
Read Only	Select this option to allow the delegated provider group or individual read-only access to the tasks. **Note:** A sales manager will have owner access even for tasks delegated to his team members with read-only access.
Include Private	Select this option to allow the delegated provider group or individual access to your personal tasks. **Note:** A supervisor may not delegate the personal tasks of a direct report.

Use the **Delegated By Supervisor** grid to view any delegation of your tasks that has been made for you by your supervisor. Workers cannot change these entries: they may only view them.

Task Details Page

Use the Task Details page (RB_TSK) to create a task or update task details.

Navigation:

• Click a listed task on the My Tasks page.

- Click the Add Task toolbar button on the My Task page.

- Select a task type and click the Add Task button on the My Tasks page.

This example illustrates the fields and controls on the Task Details page (1 of 2).

This example illustrates the fields and controls on the Task Details page (2 of 2).

Task Details

Field or Control	Description
Subject	Enter the meeting subject that appears on the My Tasks list.
Task Type	Select a task type if you access this page from the toolbar. If you access this page from the My Tasks page, the system displays the task type you select on the My Tasks page.
Status	Select the status of the task from the list of available statuses: *Cancelled, Completed, In Progress,* and *Open.*

Field or Control	Description
Private	Select to permit only the task owner to access task details.
Start Date, Start Time, End Date, and **End Time**	Enter the starting and ending dates and times of the task. **Note:** If a task already has a start date and an end date, changing the start date (or start time) will also change the end date (or end time) by an equal amount (to maintain the original duration of the task). You may change this defaulted end date or time value, if desired.
Provider Group	Enter the name of the provider group that owns this task. A task must be associated with a provider group or an individual owner (or both). **Note:** This will only be visible on a task if the corresponding Task Type definition has been configured to display this field. If this field is not visible for a particular task, a value in the **Owner** field will be required.
Owner Name	Enter the name of the individual task owner. The owner might not actually perform the task, but is responsible for task completion. If the task is also associated with a provider group, then only members of that provider group will be available as choices for the owner: otherwise any worker may be selected as an owner.
Repeats	Select the reoccurrence frequency for the task.
Options	Click to access the Task Repeating Options page (RB_TSK_ REPEAT_SEC) configure the settings for the repeating task.

Field or Control	*Description*
View or Link Related Objects	Click to link a company, lead, opportunity, or referral to the task. This link appears only if **View or Link Transactions** was selected on the Task Type page. Clicking this link accesses the Related Objects for the Task page (RB_TSK_ TXNS) where you can search for and select objects to link to the task.
	Note: If you select a company, lead, opportunity, or referral on the Related Objects for the Task page, the name of that object appears as a link above the **View or Link Related Objects** link. If you click the link, the system takes you to the page where the object was originally established. If a company has one or multiple contacts, the system still takes you to the Company page.
Reminder	If you want to receive a reminder for this task, enter the number of days, hours, or minutes the reminder should send before the task is scheduled to begin.
	Note: If the reminder time for the newly created task is within an hour from the current time, the task reminder is sent immediately regardless of when the reminder time was set originally. This occurs because the task reminder daemon is programmed to pick up and process reminder emails that are set between an hour before and an hour after the current time. However, if the reminder is set to occur further than an hour from the current time, the daemon sends the reminder as specified. For example, if the current time is 9 am, the task start time is 10 am, and the reminder is set for 10 minutes (09:50 am), the reminder time falls in the time range within which the task reminder daemon picks up and processes reminder emails (8-10 am). In this case, the system sends the reminder email immediately. In another example where the current time is 9 am, the task start time is 11 am, and the reminder is set for 10 minutes (10:50 am). Since the reminder time does not fall in the time range within which reminders are processed immediately (8-10 am), in this case, the system sends the reminder email at the preset reminder time.

<Invitees / Assignees>

The label of this grid changes depending on the task type. As delivered, the label is **Invitees** for the *Meeting* task type and **Assigned To** for task types *Activity, Approval,* and *Mtg.*

The systems displays different information in this section based on how you configured the Task Type page. You can add this grid to add task types or modify the labels using the Task Type page.

Field or Control	Description
Display Name	Enter the name of the person to whom the task is assigned or who is invited to the meeting.
Reassign	Click to replace the meeting invitee with another contact. The system sends the new invitee an email. The system removes the task from the original invitee's task list.
Create	Click to create the meeting invitee as a contact in the CRM system. For invitees who are not available in CDM, the **Create** button is presented for you to add the invitee as a contact using Quick Create. **Note:** If CDM integration is enabled, the duplicate prevention logic is triggered when you click the **Create** button. The Evaluate Duplicate Person page appears if it finds duplicate entries that resemble the contact you are about to add. You can select an existing match from the list that returns, or choose to create a new person record for that invitee in CDM.
Role	Select the person's role. The company name that the person represents appear in the list, as well as other roles the person has, such as *Individual Consumer.*
Status	Indicates the status of the task assignee: *Assigned, Accepted,* or *Declined.*
Attendance	Select *Absent* or *Attended.* This field is available only if you select **Record Attendance** on the Task Type page.
Invitation Type	Select whether the invitation is *Mandatory, FYI,* or *Optional* for the invitee. This column appears only if the **Show Invitation Type** field is selected for this task type on the Task Type page.

Contacts

Field or Control	Description
Primary	Select to indicate that the contact who is listed in the row is the primary contact for this task. There is only one primary contact for a task, and the primary contact name appears for the task when it is listed on the My Tasks page.

Adding an Invitee or Contacts

To add a person to either the **Invitees** grid or the **Contacts** grid, enter a first and last name below the grid and click the **Invite** or **Add** button.

If the first and last name do not uniquely identify a person, the Search For Contact page appears. Select one or more listed persons and click **Select.**

This example illustrates the fields and controls on the Search For Contact page.

The selected persons are added to the task and you are transferred back to the Task Details page. You can also enter new search criteria or return to the Task Details page without making any selections.

The task owner and assignee can reassign the task by changing the person name in the assignee box.

Related Links

Setting Up Task Management

My Tasks - Notes Page

Use the My Tasks - Notes page (RB_TSK_NOTE) to view or add notes to a task.

Navigation:

Select the Notes tab on the Task Details page.

See Understanding Notes and Attachments.

Related Objects for the Task Page

Use the Related Objects for the Task page (RB_TSK_TXNS) to link related transactions to a task.

Navigation:

Click the **View or Link Related Objects** link on the Task Details page.

This example illustrates the fields and controls on the Related Objects for the Task page.

When you select a transaction type, the text that appears next to the **Add Transaction** button changes to reflect the transaction type.

Field or Control	Description
Primary	Select to designate that this is the primary transaction that is associated with the task. The system displays this task on the Task Details page in the field above the **View or Link Related Objects** link.
Transaction	Select a transaction type.
Add Transaction	Select to choose a transaction from a list of transactions for the selected transaction type.

Viewing Calendars

This topic discusses how to view calendars.

Pages Used to View Calendars

Page Name	Definition Name	Usage
<u><Daily, Weekly, or Monthly> Calendar of <Name> Page</u>	RB_TSK_CALENDAR	View or update a calendar.
<Daily, Weekly or Monthly> Team Calendar of <Name> Page	RB_TSK_CALENDAR	View calendar entries for other individuals.
<u>Another's Calendar for <Name> Page</u>	RB_TSK_CAL_SRCH	Search for another person to view his or her calendar.
Provider Group Calendar of <Name> Page	RB_TSK_CALENDAR	View a provider group's calendar.
My Calendar - Options Page	RB_TSK_PREF_SEC	Set the default calendar view (daily, weekly, or monthly).

<Daily, Weekly, or Monthly> Calendar of <Name> Page

Use the <Daily, Weekly, or Monthly> Calendar of <Name> page (RB_TSK_CALENDAR) to view or update a calendar.

Navigation:

- **My Calendars**

  Click the **Daily, Weekly,** or **Monthly** toolbar buttons.

- **My Tasks**

  Click the **My Calendar** toolbar button.

  Click the **Daily, Weekly,** or **Monthly** link.

This example illustrates the fields and controls on the <Daily, Weekly, or Monthly> Calendar of <Name> page, in this case, the Daily Calendar of Stu Marx.

See <u>Understanding Calendars</u>.

Another's Calendar for <Name> Page

Use the Another's Calendar for <Name> page (RB_TSK_CAL_SRCH) to search for another person to view his or her calendar.

Navigation:

On the daily, weekly, or monthly calendar, click the **View Another's Calendar** link.

This example illustrates the fields and controls on the Another's Calendar for <Name> page.

Select the Person's Calendar to View

Search for the person whose calendar you want to see. You can click a person's name to view their calendar or refine the search criteria and search again.

Show in Results

Select one or more listed relationships. Only those persons who meet the search criteria and have the selected relationships to you appear in the search results.

Chapter 24

Working with Call Reports

Understanding Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees, what took place during the event, and any follow-up tasks.

You can view or add call reports directly to a company, consumer, contact, lead, opportunity, or task from the Call Reports tab on these components. When you add a call report to a lead, opportunity, or task, the call report is linked to the customer for the lead, opportunity, or task.

You can view call reports for a customer or contact from the Call Reports tab on the Customer 360-Degree View page or access call reports directly from the left hand navigation. If you have licensed PeopleSoft CRM Portal Pack, you can view your own call reports in the My Call Reports pagelet that you can add to your home page by using the **Personalize** link

See PeopleSoft Portal Pack.

Working with Call Reports

This topic lists the pages used to access call reports and discusses how to add call reports.

Pages Used to Work with Call Reports

Page Name	*Definition Name*	*Usage*
<u>Call Report Details Page</u>	RD_CALL_REPORT	Add, search, or update a call report. You can also navigate to the Call Report Details page from the Call Reports page in the Company, Person, Lead, or Opportunity components.
Company - Call Reports Page	RD_CALLRPT_LST_TXN	View a list of call reports for a company.
Person - Call Reports Page	RD_PRSN_CALL_RPTS	View a list of call reports for a consumer or contact.
Lead - Call Reports Page Opportunity - Call Reports Page	RSF_CALL_RPTS	View or add call reports on a lead or opportunity.

Page Name	Definition Name	Usage
Call Report Details - Related Objects for the Call Report Page	RD_CALLRPT_TXNS	View a list of related objects (companies, leads, and opportunities) for the call report or add a related object to the call report.

Call Report Details Page

Use the Call Report Details page (RD_CALL_REPORT) to add, search, or update a call report.

Navigation:

- Select a contact on the My Contacts page. Then select *Add Call Report for Contact(s)* in the **Action** field and click **Go.**

- **Sales** > **Add Call Report**

- **Sales** > **Search Call Reports**

This example illustrates the fields and controls on the Call Report Details page (1 of 2).

This example illustrates the fields and controls on the Call Report Details page (2 of 2).

General Information

Enter information that describes the event.

Field or Control	Description
Event Type	Select one of these values: *Face to Face Meeting, Telephone,* or *Other.*
View or Link Related Objects	Click to access the Related Objects for the Call Report page where you can view or add related companies, leads, and opportunities.

Add a Note and Notes Summary

Enter notes and attachments that relate to the event.

See Understanding Notes and Attachments.

Contacts

View the list of contacts that attended the event and designate the primary contact.

Field or Control	Description
Email Call Report	Select one or more contacts and then click this button to email the call report to the selected contacts.
	Note: You must save a call report before you can email it.

Add Contacts

You can add CRM contacts, if necessary, to this call report by entering first and last names.

Follow Up Tasks

View the list of tasks associated with the event. When you create a follow up task for a call report, its contacts are assigned as the contacts for the task by default.

Field or Control	Description
Add Follow-Up Task	Click to access the Task Details page.

See Understanding Task Management.

Call Report Details - Related Objects for the Call Report Page

Use the Call Report Details - Related Objects for the Call Report page (RD_CALLRPT_TXNS) to view a list of related objects (companies, leads, and opportunities) for the call report or add a related object to the call report.

Navigation:

Click the **View or Link Related Objects** link in the General Information section on the Call Report page or on the Call Report Details page.

This example illustrates the fields and controls on the Call Report Details - Related Objects for the Call Report page.

Select a related object; either *Company, Lead,* or *Opportunity.* The field to the right changes based on your selection. Select the related object. Click the **Add Related Object** button.

Click the **Return to Call Report Details** link to go back to the Call Report Details page.

Chapter 25

Working with Exchange Integration

Understanding PeopleSoft CRM and Microsoft Exchange Integration

This topic discusses:

- PeopleSoft CRM and Microsoft Exchange integration.

- Synchronization of contacts.

- Synchronization of calendar entries.

- Use of category.

- Conflict resolution.

PeopleSoft CRM and Microsoft Exchange Integration

The PeopleSoft CRM and Microsoft Exchange integration provides enterprise users the ability to synchronize contact and calendar data between CRM and Exchange (data in Exchange is accessible to users through Microsoft Outlook). This integration is driven by Oracle Business Data Synchronization Server (BDSS), an Oracle Fusion Middleware synchronization technology service that facilitates data exchanges between different types of Personal Information Management (PIM) data stores, PeopleSoft CRM and Microsoft Exchange in this case.

Through this integration, contacts that are added or updated from the CRM system are synchronized to Microsoft Exchange and then Outlook. Calendar entries that are added, updated or removed from one PIM system are synchronized to the other system. Data synchronization takes place behind the scenes and requires no end-user intervention.

Data Synchronization Process Flow

BDSS is a synchronization service that enables server data stores to exchange and compare data. It is the center of a hub and spoke architecture in which different PIM systems synchronize enterprise data with one another through it. BDSS interacts with PIM systems using *connectors*, which are standard communication interfaces between the hub (BDSS) and its spokes (PIM systems). As a synchronization process begins, connectors pass changed data from PIM systems to BDSS to be processed. In the case of PeopleSoft CRM, the PeopleSoft connector retrieves changed data for users from the CRM system through the Contact and Calendar web services that the CRM system delivers. Data is then transformed into a compliant format and passed to BDSS. At the end of the process, connectors write the synchronized data that they receive from BDSS back to their PIM systems.

This diagram illustrates how data flows amongst BDSS and PIM servers in a synchronization process:

This example illustrates the fields and controls on the Data Flow between PeopleSoft CRM and Microsoft Exchange and Outlook in a synchronization process.
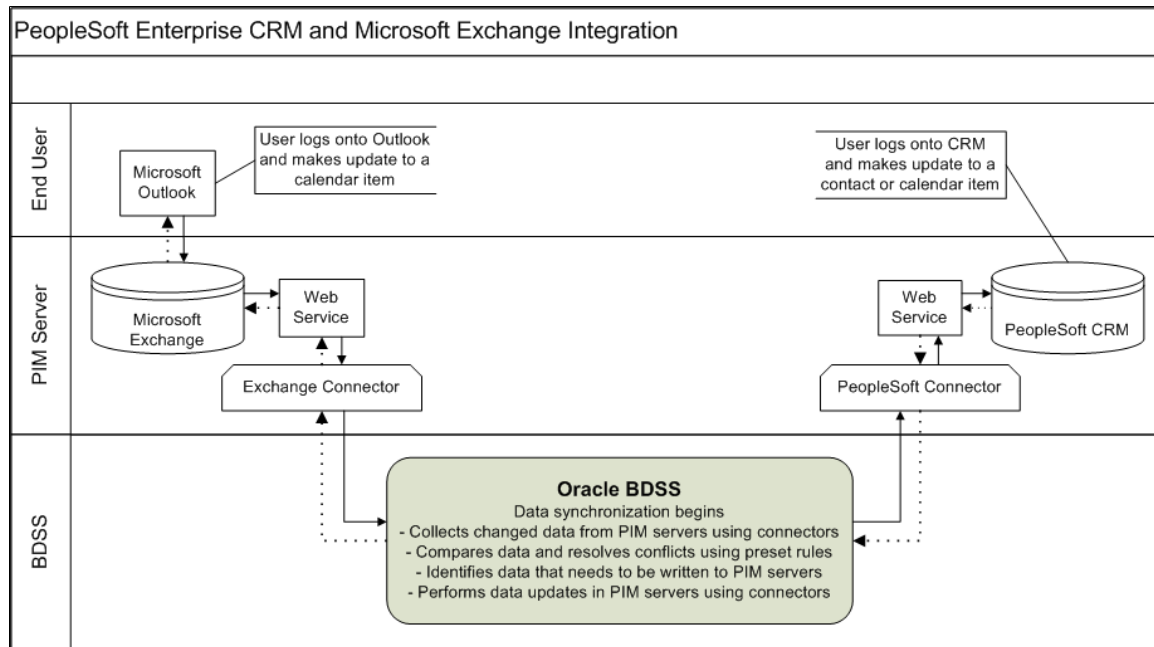
Here is a sample synopsis of the synchronization process flow at runtime:

1. User Jane Doe updates a meeting of hers in her Outlook client.

    User Stephen Ray creates a business contact in CRM.

2. The synchronization process is invoked in BDSS by a scheduler program as set up in the system.

    BDSS performs a number of tasks for the synchronization process, which include:

    •   Identifying the list of users to be included in the process and verifying that they are available for synchronization.

    •   Connecting to the CRM and Exchange connectors respectively, asking from each of the two server systems for the set of records that have created or changed for each user since the last synchronization.

        Contact data from CRM is extracted based on the users included in the process, the last synchronization date and time and the predefined dataset rules.

        Calendar data from CRM is extracted based on the users included in the process and the last synchronization date and time.

    •   Processing the data that was extracted from CRM and Exchange through their connectors.

        Contact data from CRM is transformed to the Exchange-compatible format within the PeopleSoft connector, and is compared with the contact data that is collected from Exchange in BDSS. The comparison is done between contact pairs (for example, John Doe from CRM and John Doe from Exchange) that are mapped by their record IDs. The mapping table is stored in BDSS. In case of new contacts, no record ID mapping is available. New contacts are compared to Exchange contacts based on the predefined comparison fields (first name, last name and email address).

As there are no Exchange contacts to compare to, these new CRM contacts will be created in the Exchange system later in the process.

Calendar data from CRM is transformed to a standardized internet calendar format (called *iCal*) within the PeopleSoft connector, and is compared with the calendar data from Exchange in BDSS. The remaining processing logic is similar between calendar entries and contacts.

- Resolving any data conflict that arise in the process, and preparing the result data set to be updated in each PIM server.

  As delivered, CRM records take precedence of Exchange records in case of data conflict.

- Passing the result data set to corresponding connectors.

3. CRM and Exchange connectors receive their result sets and update the contact and calendar information for users in their servers accordingly.

4. The synchronization process is completed. User Jane Doe sees her updated meeting in CRM, and the contact that user Stephen Ray created is now available in his Outlook application.

Refer to the installation guide for information on installing the PeopleSoft CRM Personal Information Management Server and setting up synchronization in BDSS and PeopleSoft CRM.

See *PeopleSoft Enterprise Customer Relationship Management Personal Information Management Server Sync Installation Guide*

Note: The CRM and Exchange integration, also known as PIM Server Synchronization, is a licensed product offering. PeopleSoft CRM provides an installation option (called *PIM Server Sync*) for this integration on the General Options page. You can, for informational purposes, turn it on to indicate that the integration has been activated for the CRM system.

See General Options Page.

Scheduling of Data Synchronization

Oracle Business Data Synchronization Server provides a Java program (called *DispatcherClient*) that initiates the data synchronization process and this program can be called from a command line manually, or a scheduler program (for example, Windows' Scheduled Tasks or Oracle Enterprise Manager Scheduler) to run automatically on a schedule. Refer to the BDSS documentation for more information on scheduling data synchronization processes.

See *Oracle Fusion Middleware Administrator's Guide for Oracle Business Data Synchronization Server*

Users

To include users in the synchronization process, they need to be defined in both the BDSS and CRM systems as part of the setup.

See Specifying PIM Users for Synchronization.

In addition, create a SuperUser in the CRM system. This user is served as an administrator user who has all the necessary security privileges to facilitate data synchronization, including access to the contact and calendar web services as it is being used to invoke these web services on behalf of PIM users at runtime.

Do not create the SuperUser as a PIM user in both systems, and do not make any calendar updates using this SuperUser ID.

Refer to the installation guide for instructions on how to create PIM users and the SuperUser.

See *PeopleSoft Enterprise Customer Relationship Management Personal Information Management Server Sync Installation Guide,* Setting Up Synchronization in BDSS and PeopleSoft CRM

Synchronization of Contacts

The CRM and Exchange integration enables you to synchronize contact information between them. This table lists the actions and the directions of data flow that are supported when synchronization takes place:

Action	*From*	*To*	*Result*
Add Contact	CRM	Outlook	New contact added to Outlook with the *Peoplesoft* category.
Outlook	CRM	Not synchronized to CRM.	
Update Contact	CRM	Outlook	Updated contact modified in Outlook. The contact has the *Peoplesoft* category.
Outlook	CRM	Updated contact (who was originally created in CRM) modified in CRM. The contact has the *Peoplesoft* category. Contacts who were originally created in Outlook are not synchronized to CRM.	
Delete Contact	CRM	Outlook	Not synchronized to Outlook.
Outlook	CRM	Not synchronized to CRM.	

Contact Creation

In PeopleSoft CRM, users access the My Contacts component to add new contacts to their own contact list. When a synchronization session completes, users can see from their Outlook clients the contacts that were created from CRM between the synchronization that was just finished and the one prior to that. These contacts are tagged with the *Peoplesoft* category, a hard-coded filter criterion used to identify data that is subject to synchronization. In addition to contacts on user's contact list, the synchronization process also propagates to Outlook systems contacts that are referenced in leads and opportunities to which the user is assigned. PeopleSoft leverages dataset rules to conclude the set of contacts that need to be synchronized in Exchange for each user.

Note: Users in CRM can add contacts through other means, such as the Person component or any other transactional pages that support the creation of contacts (using Quick Create), for example, Leads and Opportunities.

Contacts created in Outlook are not synchronized to CRM.

Contact Update

When users modify contact information, such as name, email address, phone and physical address, in the CRM system, the same change is synchronized to Microsoft Exchange and reflected in the Outlook clients for users who have access to those contacts based on dataset rules.

Similarly, contact updates made from Outlook are available in CRM after synchronization. However, instead of overwriting old contact information with the new update, modified information is added as new entry for contacts in CRM. Old contact information remains in the system. This behavior is similar to making a modification to the contact phone and email information in the Lead or Opportunity component.

As mentioned previously, contacts created from Outlook are excluded from the synchronization process. Therefore, the process supports updates of contacts who were originally created from CRM only; updates of contacts that were created from Outlook are ignored. Contact updates coming from the Exchange system are based on the sync data of BDSS (the BDSS hub knows which contacts were created originally in the CRM system). Contact changes that have been synchronized to CRM from Outlook will be synchronized back to all Exchange users who have access to the contacts.

Note: When adding phone numbers in Outlook, enter them in this format: xxx-xxx-xxxx. Do not include spaces.
When adding addresses in Outlook, you must enter countries or regions for them to be synchronized to CRM.

Contact Deletion

Contacts deleted in Outlook are not synchronized to CRM.

Contact records cannot be deleted from CRM, however, they can be removed from users' contact lists (on the My Contacts page). Removal of contacts from a user's contact list is *not* synchronized to Exchange.

Contact Method Deletion

Removal of contact methods (for example, phone, email address, or physical address) from contacts in CRM is synchronized to Exchange.

Use of Datasets to Filter Contacts for User's Outlook

To help control the distribution of data more effectively and shorten the time needed for data synchronization, datasets are used as a data filtering mechanism in the synchronization process. Outlook users receive a subset of contact data from the CRM system that pertains to their individual business use based on dataset rules, which are a series of sub queries of views that select the newly added or updated contact data that gets downloaded and updated in the Outlook system during synchronization.

PeopleSoft delivers these dataset rules under the RBP_CONTACTS dataset for synchronization on contacts; any given user receives data updates on their Outlook applications for:

•   Contacts that are created by the user.

- Contacts on leads in which the user is present.

- Contacts on leads that are created by the user.

- Contacts on opportunities in which the user is present.

- Contacts on opportunities that are created by the user.

With these dataset rules in place, the user will not see any contacts that do not pertain to his or her work on Outlook at the end of the synchronization.

The use of datasets does not apply to calendar entries.

Refer to "Using Datasets, Defining Dataset Rules" in the *Active Analytics Framework* product documentation for more information on datasets.

Field Mapping

A field mapping identifies the field a piece of data gets extracted from the source system and the corresponding field it gets displayed in the target system at the end of a synchronization run. This table lists the delivered field mappings between PeopleSoft CRM and Outlook contacts:

Contact Name:

PeopleSoft	*Outlook*
First Name	First
Name	Full Name
Last Name	Last
Middle Name	Middle
Title	Job title

Contact Address (mapping applies to the *Business, Home* and *Other* types):

Address Type	*PeopleSoft*	*Outlook*
Business, Home, or Other	Address 1	Street
Address 2	Street	
Address 3	Street	

Address Type	PeopleSoft	Outlook
Address 4	Street	
City	City	
State	State/Province	
Country	Country/Region	
Postal	ZIP/Postal code	

Note: Data from the Address 1, Address 2, Address 3 and Address 4 fields is merged into the Street field during synchronization. Each PeopleSoft address line appears as separate lines in the Street field. When Outlook addresses are synchronized to the CRM system, data in the Street field is parsed into Address 1, Address 2 and Address 3 fields respectively.

Contact Phone Number (mapping applies to the *Business, Home* and *Cellular* and *FAX* types):

Phone Type	PeopleSoft	Outlook
Business	Number	Business Local number
Home	Number	Home Local number
Cellular	Number	Mobile Local number
FAX	Number	Business Fax Local number

Contact Email (mapping applies to the *Business* type):

Email Type	PeopleSoft	Outlook
Business	Email Address	E-mail

Additional Fields:

PeopleSoft	Outlook
Customer If a contact is associated with multiple customers (companies), names of these companies are concatenated (separated by semicolons) into the Company field in the Exchange system after synchronization.	Company
Department	Department

Synchronization of Calendar Entries

The CRM and Exchange integration enables you to synchronize calendar entries between them. This table lists the actions and the directions of data flow that are supported when synchronization takes place:

Note: *Invitees* in CRM are called *attendees* in Outlook.

Action	From	To	Result
Add Calendar Entry	CRM	Outlook	New calendar entry added to Outlook with the *Peoplesoft* category.
Outlook	CRM	New calendar entry added to CRM as: • *Appointment* if there are no invitees. • *Meeting* if there are invitees.	
Update Calendar Entry	CRM	Outlook	Modified calendar entry updated in Outlook.
Outlook	CRM	Modified calendar entry updated in CRM. The entry has the *Peoplesoft* category. **Important!** Only changes that are made by the creators of calendar entries get synchronized to CRM. Changes made by invitees are not synchronized to CRM.	

Action	From	To	Result
Delete Calendar Entry	CRM	Outlook	If an invitee cancels a calendar entry in CRM, it is marked as *Cancelled* in CRM, and is removed from Outlook if synchronization has already taken place, or it is not created in Outlook if synchronization has not occurred. The owner sees the entry in Exchange, which shows who declined the entry. If the owner cancels it, it is removed in Outlook.
	Outlook	CRM	Calendar entry is marked as *Cancelled* in CRM if it is deleted by its creator. If an invitee of the entry deletes it from Outlook *after* the entry is synchronized to CRM, the entry shows the invitee status as *Assigned* in CRM. If an invitee of the entry deletes it from Outlook *before* the entry is synchronized to CRM: • An entry is created for the invitee in CRM. • The creator sees the entry in CRM, with names of all invitees who accepted it and their acceptance status. Invitees who declined the entry appear with their assigned status.

In the CRM system, calendar entries are types of tasks. This table lists the delivered PeopleSoft task types and for those that are supported in this integration, they are mapped to Outlook as calendar items:

PeopleSoft Task Types	Outlook
Appointment	Calendar
Meeting	Calendar
Reminder	Not supported in this integration

PeopleSoft Task Types	Outlook
All Day Event	Not supported in this integration
Phone Call	Not supported in this integration
To Do	Not supported in this integration

Note: For calendar entries that are marked as all day events, they are synchronized into the CRM system as *meetings* with the start date and time set to 12:00 am of the meeting date and the end date and time 12:00 am of the following day.

Calendar Entry Creation

In PeopleSoft CRM, users access the My Calendar component to add new calendar entries. When a synchronization session completes, users can see from their Outlook clients the calendar entries that were created from CRM between the synchronization that was just finished and the one prior to that. These entries are tagged with the *Peoplesoft* category, which is a hard-coded filter criterion used to identify data that is subject to synchronization if you set up the integration to synchronize calendar entries based on category.

In addition to calendar entries that they created, users also see on their calendars entries which they are invited to attend.

Exchange users can create calendar entries from their Outlook clients as well. Calendar entries are synchronized to CRM and appear on the calendars of their owners and invitees.

See Use of Category

Calendar Entry Update

When owners of calendar entries modify information, such as date, time, subject and invitee list, in the CRM system, the same change is synchronized to Microsoft Exchange and reflected in the Outlook clients for users who are either the owners or the invitees of the entries.

Similarly, calendar entry updates made from Outlook by their organizers are available in CRM after synchronization.

Note: Invitees can make changes to calendar entries but the updates are not synchronized to the other system. An exception to this is when invitees decline the calendar invitation; this status change will be synchronized to the other system at the end of the process.

See Use of Category

Calendar Entry Deletion

In PeopleSoft CRM, calendar entries cannot be removed from the system, rather, they can be cancelled by owners or declined by invitees. After synchronization completes, corresponding calendar entries are removed from the Exchange calendars of their owners and invitees.

Both owners and attendees can delete their calendar entries on Outlook. If an entry is deleted by the owner, it appears as cancelled in CRM; if it is deleted by an invitee, it still appears in CRM and the status of the invitee is set to *Assigned* (status is not synchronized).

Field Mapping

This table lists the field mappings between PeopleSoft CRM and Outlook calendar entries:

PeopleSoft	*Outlook*
Subject	Subject
Status: *Cancelled* *Completed* *In Progress* *Open*	All replicated regardless of status.
Private	Private
Priority *High* *Medium* *Low*	Priority *High* *High* *Low*
Start Date	Start Date
Start Time	Start Time
Time Zone	Sets to current user's time zone by default
End Date	End Date
End Time	End Time
Location	Location

PeopleSoft	Outlook
Owner (for Meeting) Provider Group (for Appointment)	Value is used to validate the task ownership and is not replicated. In the case of appointments, the members of the provider group are automatically populated as invitees.
Repeats	Recurrence
Reminder	Reminder
Description	Description
Invitee	Invitee

Calendar Entries with Invitees/Attendees

In PeopleSoft CRM, users can create meetings (a type of calendar entry supported in this integration) which include invitees. When a meeting is synchronized to Microsoft Exchange, it appears on the calendars of its owner (creator) and its invitees (if they are Exchange users). CRM meeting invitees must be CRM contacts and defined as PIM users but they do not have to be contacts of the meeting owner or contacts in Exchange. For invitees who are not Exchange contacts, they will not be created as Exchange contacts at the end of synchronization.

Similarly, users can create calendar entries that include attendees in Microsoft Exchange. When an Outlook meeting is synchronized to the CRM system, the first name, last name, full name and email address of each attendee are used to find a matching contact in the CRM system. This matching occurs only for the first time when the calendar item is created in both systems and they haven't been synchronized previously. Each identified attendee appears as an invitee of the synchronized calendar entry in CRM. For those that cannot be identified as PeopleSoft users or contacts, they are shown in the calendar entry as external invitees if each of them is associated with an email address.

Invitee Status in Meetings

When an invitee accepts a meeting invitation, make sure that the acceptance is done in both systems manually or the calendar entry can go out-of-sync. This type of status change (acceptance of invitation) is not supported in the synchronization process.

As for declining a meeting invitation, the invitee only needs to do it in one system; this type of status update gets propagated to the other system at the end of synchronization. In other words, if you decline a meeting (or you're removed from a meeting as an invitee) in one PIM system, the meeting entry is removed from the other PIM system after synchronization completes.

Meetings with non-PeopleSoft Owners

In Microsoft Outlook, users (who are not registered users in PeopleSoft, also referred to as external users) can create calendar entries with PeopleSoft users or contacts as attendees and these calendar entries can

get synchronized to PeopleSoft CRM. These calendar entries are created as *appointments* in CRM, and the owners of these appointments, who are not PeopleSoft users, are displayed in the invitee lists as external users, with their owner position being replaced by invitees in the appointments who are valid PeopleSoft users. For information purposes, each of these appointments will have the email address of its non-PeopleSoft owner recorded as message detail.

Note that calendar entries of this nature can get out-of-sync as the changes that are made by the original owner (who is not a PeopleSoft user) are not synchronized to the other system because he or she is no longer the current owner of the entry, and the synchronization process only honors owner-initiated changes.

Meetings with non-PeopleSoft Attendees

If Outlook calendar entries include attendees who are not PeopleSoft contacts or users, these individuals are synchronized to the CRM system as *external invitees* provided that they have email addresses associated with them.

Recurring Calendar Entries

Both PeopleSoft CRM and Microsoft Exchange support the creation of recurring calendar entries, events that occur daily, weekly, monthly and yearly. Users can also specify the range of recurrence. Recurring entries created in one system are populated to the other system at the end of synchronization.

In PeopleSoft CRM, when you make and save a change (for example, description, location, or start date) on a recurring calendar entry, the system asks if the change is to be applied to the current instance or current plus all future instances of the series. If you select the latter option, all (not just current and future) instances of the series are updated in the Exchange system when synchronization completes.

PeopleSoft CRM Calendar Repeating Options

The PeopleSoft CRM Calendar supports a number of repeating options for calendar entries on the Task Repeating Options page (RB_TSK_REPEAT_SEC), including daily, weekly, monthly, yearly and custom. This table lists the recommendations for setting up recurring calendar entries in CRM:

Repeating Type	Recommendation
Custom - the ability to schedule a calendar entry to occur on specified dates	Not supported. Do not configure custom repeating options for calendar entries that are subject to synchronization.
Daily, Monthly and Yearly	If a calendar entry is set up to recur, use only the *Don't Move* value for the **If Date Occurs on a Non-Work Day** option.
Monthly and Yearly	Do no use the **Count from End of Month** option.

Note: If you set up recurrence for a calendar entry in Outlook to not have an end date, the entry will be created in CRM to recur for six months.

Data Translation for Time Zones in Calendars

PeopleSoft delivers 19 time zones in the system, whereas Java supports about 600 time zones. These two sets of time zones are delivered in PeopleSoft as codeset setup data. The codeset groups are *RBP_ECRM* (with 19 PeopleSoft-supported time zones) and *RBP_BDSS* (with 600 Java-supported time zones) and the mappings are predefined. If deemed necessary, modify the mappings to suit your business needs.

Refer to "Applying Filtering, Transformation and Translation, Understanding Data Translation" in *PeopleTools: Integration Broker* product documentation for more information on codesets.

Data Translation for Contact Information

PeopleSoft also delivers codeset group *PIM* to provide mappings of country, title and state values between systems. It is referenced in the PSFT_PIM node for this integration.

Use of Category

When PeopleSoft contacts and calendar entries are synchronized to Exchange successfully, they are displayed in Outlook with a *PeopleSoft* category. The category helps users to identify, for example, contacts that were brought to Outlook from PeopleSoft as opposed to the ones that were created in Outlook or any other PIM systems. Also, if a customer has multiple PIM systems interacting with BDSS and wishes to limit PeopleSoft contacts and calendar entries to the Exchange system only, they can set that up in BDSS using the *PeopleSoft* category.

Data filtering occurs in BDSS. Customers can configure BDSS to filter on the *PeopleSoft* category for the synchronization process.

Important! By default, *all calendar entries* are synchronized regardless of category. However, you can set up the filter capability that is in place to synchronize calendar data based on the category of *PeopleSoft*.

The BDSS profiles database has a setting called *EarliestCalendarDate* and it is used during the initial synchronization of calendar data from PeopleSoft to Exchange systems. The integration looks for and processes calendar entries that are created after this date. The default value of this setting is *January 01, 2011*.

When a user creates a contact or a calendar entry in CRM and it later gets synchronized to Exchange, it is displayed in the user's Outlook client along with the *PeopleSoft* category. In the case when the user creates a calendar entry in Outlook, and BDSS is set up to use filter, the user must tag the entry with the *PeopleSoft* category for it to be picked up by the synchronization process.

As for updates, contacts and calendar items are subject to synchronization (from Exchange to CRM) if they are in the *PeopleSoft* category and BDSS is set up to use filter.

Conflict Resolution

A data conflict can arise if the same contact record (sharing the same first name, last name and email address) or the same calendar entry (sharing the same subject and start time) is shown to have been added *for the first time* in both CRM and Exchange servers in a single synchronization session. Data conflicts are handled by BDSS based on the priority that is set for each connector domain involved in the integration. In this integration, the Contact and Calendar domains of the PeopleSoft connector are

configured with a higher priority than those of the Exchange connector. In other words, when a conflict occurs, the record of the PeopleSoft side always wins.

Suppose that you add a contact called *John Doe* in both CRM and Exchange systems and these newly created contacts are captured in the same synchronization process. This is considered a data conflict because of the matching first and last names in these new records. As a result, the contact record from CRM wins and is used for *John Doe* in the Exchange system. The conflict has no impact one the CRM system because new contacts from Exchange are not synchronized to CRM.

Here is another example. You add a contact called *John Doe* in the CRM system and a contact named *Johnny Doe* in the Exchange system. These new contacts are captured within the same synchronization process and John Doe from CRM is replicated to the Exchange system as a result. Later, you modify the contact name from *Johnny Doe* to *John Doe* in the Exchange system. In this case, these contacts are not considered in conflict even though they share the same first and last names, because they are not added to the system for the first time.

The system creates a log entry after a data conflict is resolved.

Related Links
Reviewing Synchronization Logs

Specifying PIM Users for Synchronization

This topic discusses how to specify PeopleSoft users to be included in the synchronization process.

Page Used to Specify PIM Users for Synchronization

Page Name	Definition Name	Usage
PIM Users Page	RBP_USERS	Specify PeopleSoft users to be included in the synchronization process.

PIM Users Page

Use the PIM Users page (RBP_USERS) to specify PeopleSoft users to be included in the synchronization process.

Navigation:

Set Up CRM > **Product Related** > **BDSS Integration** > **PIM Users**

This example illustrates the fields and controls on the PIM Users page.

For users to be included in the synchronization process, they need to be created in BDSS before they are specified in the CRM system. Refer to the installation guide for instructions on how to create users for synchronization in BDSS.

Field or Control	Description
User ID	Select a PeopleSoft user whose contacts and calendar entries are to be synchronized between the CRM and Exchange systems.
Last Synchronization	Displays the date and time of when the last synchronization process took place.

Reviewing Synchronization Logs

This topic discusses how to review synchronization logs.

PeopleSoft CRM captures message logs as part of the Integration Broker logs. The logs include information such as each user's last synchronization date and time, data conflict results, synchronization results as well as any errors that occur during the process.

Page Used to Review Synchronization Logs

Page Name	Definition Name	Usage
Error Log Page	RBP_ERROR_LOG	Review synchronization logs for users.

Error Log Page

Use the Error Log page (RBP_ERROR_LOG) to review synchronization logs for users.

Navigation:

Set Up CRM > **Product Related** > **BDSS Integration** > **Error Log**

This example illustrates the fields and controls on the Error Log page.

User ID: BLEE		
PIM Errors	Personalize | Find | ⬀ | ▦	First ◀ 1 of 1 ▶ Last
Domain Type	Sync Date Time	Sync Error Text
1		⊟
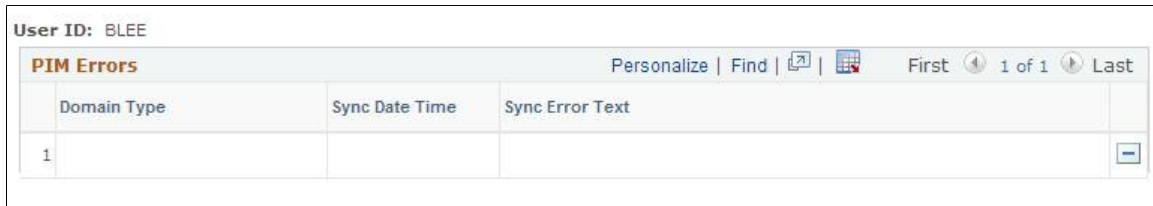
Field or Control	*Description*
Domain Type	Displays the domain (*Contact* or *Calendar*) that the synchronization error pertains to.
Sync Date Time	Displays the date and time of the synchronization.
Sync Error Text	Displays the synchronization message (retrieved from the BDSS Server) that provides details on the success or failure of the process.
⊟	Click to delete the message log.

Chapter 26

Setting Up and Managing Agreements and Warranties

Understanding Agreements and Warranties

This topic lists common elements and discusses:

- Agreements and warranties.

- Default agreements.

Common Elements Used in Agreements and Warranties

Field or Control	Description
Scope	Select the scope of the agreement. Values are: *Site:* Indicates that the agreement applies to sites that are specified on the Scope Details page. *Contact:* Indicates that the agreement applies to named callers that are specified on the Scope Details page. **Note:** Although agreements with a scope of *Contact* are not available for selection on service orders, you can select agreements of either *Site* or *Contact* as scope for cases. If you create a case and associate it to an agreement (regardless of the scope) and then create a service order from that case, you must first select an agreement for the new service order; so the agreement from the case is not defaulted to the service order.
Max. Contacts (maximum contacts) or **Maximum Number of Contacts**	Enter the maximum number of named callers one can specify on the Scope Details page. This value is applicable to agreements with a scope of *Contact*.
Provider Group and **Group Member**	Select the default provider group and group member to perform the service request that is covered by this agreement. You can change these values on the service order.

Field or Control	Description
Renew Agreement	Click to create a copy of the agreement that is about to expire. The CRM system sets the start date of the new agreement to the day after the end date of the old agreement and the new end date equal to the new start date plus the same number of days as the original agreement. You can establish new start and end dates for the renewed agreement and modify the information as necessary.
Payment Terms	Select when payment is due. Payment terms in PeopleSoft CRM are synchronized with the payment terms from PeopleSoft Financials.
Purchase Option	Select the method of purchasing the service or support offering for an agreement transaction. The prompt displays the purchase options (for agreement transactions) that are defined for the selected service, product or service-product combination in its pricing record on the Pricing Information page. The options for an agreement pricing record are: *Flat:* Indicates that the service or support offering is purchased for a flat fee. *Prepaid:* Indicates that a specified number of work units of the service or support offering is purchased in advance. **Note:** The *T&M* (time and material) purchase option only applies to agreement service or agreement case transactions, and on demand service or on demand case transactions; it is not applicable to agreement transactions.

Agreements and Warranties

In PeopleSoft CRM, *agreements* reflect service or support contracts. *Warranties* define the coverage that is offered for a particular item that is installed at a customer's site. Both warranties and agreements define the services or support that the customer is entitled to and the duration of the contract.

- Agreements:

  Agreements also define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself.

  You may associate an agreement or agreement template with multiple products; however, if you have an integration to PeopleSoft Contracts that you activated on the Installation Options – Billing and Pricing Options page, you can only have one product per agreement or agreement template line. If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid of the agreement line.

  You can define three types of agreements:

  - PeopleSoft Field Service

In a field service agreement, you specify what products in which customer sites are entitled to the service that is selected in each agreement line. An agreement can have one or multiple agreement lines, each of which also contains pricing and entitlement information. Each site on an agreement is assigned a site identification number (SIN) to identify whether a service can be performed at a particular location.

- PeopleSoft Support

  Support agreements reference products on agreement lines. Similar to field service agreements, support agreements define customer sites that are entitled to support offerings. Support agreements can also define which people can contact your call center agents for support. Each named caller that is listed on an agreement is assigned a personal identification number (PIN) to identify the person as a valid caller when that person calls for support. You can define a support agreement for sites or for named callers, but you cannot define an agreement that includes lines for both sites and named callers.

- PeopleSoft HelpDesk

  Help desk agreements represent an agreed upon level of service that an organization provides to its employees. Service level agreements define the response and restore times that the help desk will try to meet while responding to requests for service from employees. In addition to response and restore times, help desk agreements can define employees, products, installed products, priorities, sources of contact (phone, email, fax, and so on), departments, locations, and roles. Help desk agreements give agents the ability to associate an agreement line to a help desk case. Help desk agreements search against employee, products, installed products, plus other criteria such as case priority. An agreement can have one or multiple agreement lines, each of which also contains products, entitlements, and the various components that apply to the entitlements (role, department, priority, and so on).

- Warranties:

  You define the duration of the warranty and the entitlements that are owed to customers with covered products. You can associate warranties with items on the Item Definition page. For specific items that are installed at a customer's site, you can activate the warranty on the customer's installed product by using the Installed Product component.

  Note: Warranties are not listed for PeopleSoft HelpDesk agreement search results.

When searching for a customer's entitlements for a case or a service order that references an installed product, the CRM system matches agreements and warranties based on response time — either ascending or descending depending on setup option in Agreement Search Configuration page.

This diagram shows the data model for agreements and shows the relationship between agreements and warranties:

This diagram shows the data model for agreements and shows the relationship between agreements and warranties.
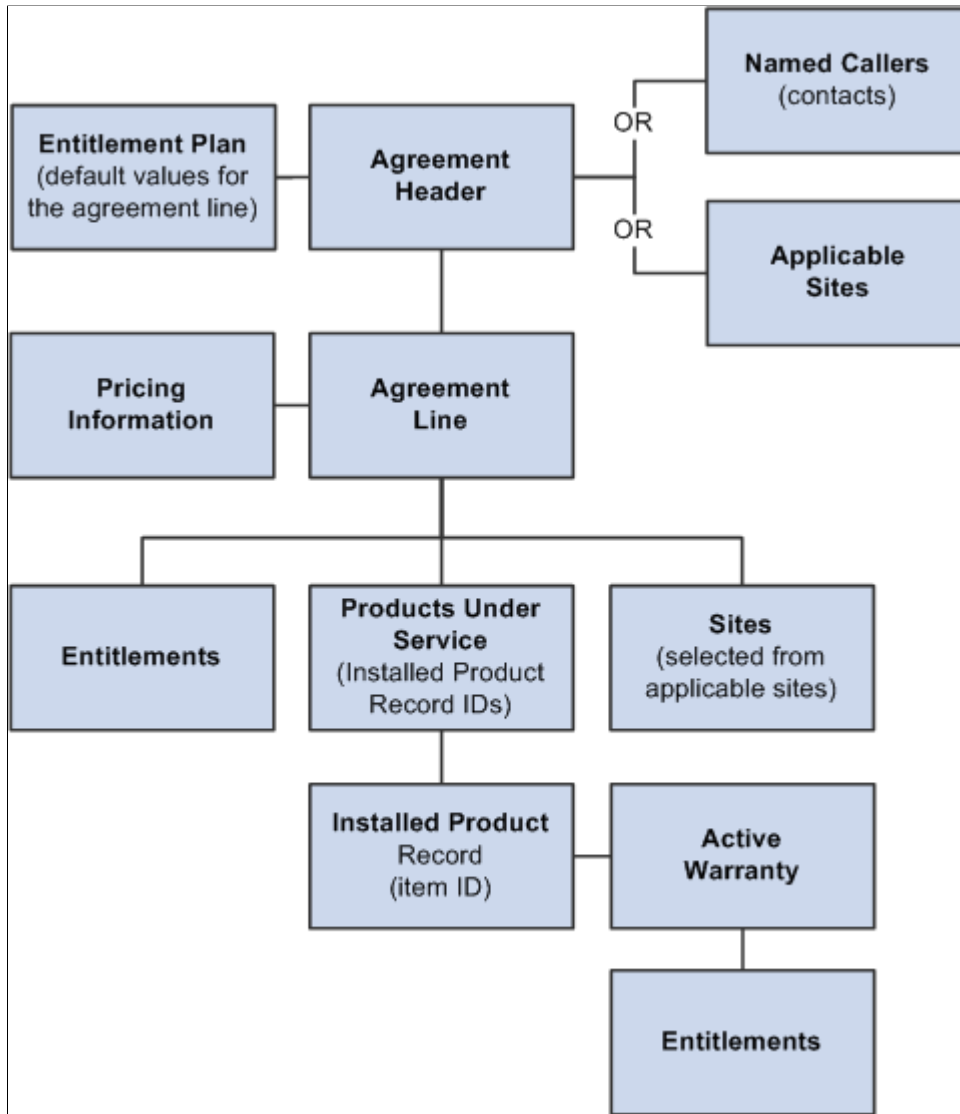
Related Links
Understanding Entitlement Searches

Default Agreements

PeopleSoft CRM enables you to create two types of default service level agreements:

*   Non-customer specific agreements:

    These types of agreements do not have any specific customers associated with them. They apply to all customers. For example, assume you create an agreement for a specific customer called ABC Enterprises and then create another agreement that is non-customer specific. Both of these agreements would potentially apply to a case that is opened for ABC Enterprises.

Only the non-customer agreement would apply to a case opened for another customer. The non-customer specific agreement may have agreement lines that specify a particular service or a service and product combination (for use in PeopleSoft Integrated FieldService). They may also specify lines for a particular product or list of products (for use in PeopleSoft Support) or specify levels of support that apply as default levels regardless of the service or product on the case.

Because they apply to all services and all products, these lines would not have a specific service or product associated with them. A non-customer specific agreement cannot have pricing data associated with it, except you can write-in values of *free* for prepaid quantities.

The user may enter a number in the **Prepaid Quantity** field and select a value (case, service order, or hour) in the **Prepaid Unit** field, both of which would define the number of free units (either cases, service orders, or hours) that are associated with that agreement. The idea is that the user gets a certain quota of free services automatically with the default agreement as represented in the **Prepaid Quantity** and **Prepaid Units** fields.

You must define non-customer specific agreements with the agreement category of *External – No Pricing*.

- Customer-specific agreement.

  These agreements contain agreement lines with no product and no service and are only valid for agreements with the *External - No Pricing* agreement type. An agreement that lists a specific customer may also contain default lines with no service and no product. These agreements are meant to apply to all cases and service orders, regardless of the service or product value of the case or service order. This means that a default agreement line with associated service level entitlements can be associated for a particular high-value customer to cover all its cases, perhaps at a higher service level than provided for in a non-customer specific agreement default line. A default line on a customer-based agreement that has no product and no service cannot be priced.

  Note: Only customer-specific agreements are shown on the agreement section of the 360-Degree search page for a particular customer.

Understanding Agreement Pricing

This topic discusses:

- Pricing record retrieval.

- Line price calculations.

- Total price calculations.

- Price recalculations.

- Uncoupling service pricing from an agreement.

Note: You can use PeopleSoft CRM to calculate agreement prices. In PeopleSoft Support, agents can accept payment by credit card at the time of the transaction regardless of whether an agreement is associated with the support case.

Pricing Record Retrieval

The CRM system can retrieve five types of pricing records for the agreement line: agreement, agreement service, agreement case, on demand service, and on demand case.

Agreement pricing records define the fee that is paid for a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. Agreement service pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed—that is, the price paid per transaction that is covered by a line item in the agreement. Likewise, agreement case pricing defines the amount payable by the customer for logging a case.

The CRM system only retrieves pricing records that are defined for the currency that is specified when you define the agreement. You cannot change the currency unless you clear the defined line pricing values.

For field service agreements, you define pricing records for a service or a service and product combination. When you create a line for a field service agreement, you can retrieve the price for the agreement. When you specify a prepaid purchase option, you must specify the prepaid quantity. The rate on the agreement pricing record that matches the criteria that you enter is used to calculate the base line price for the agreement line.

The rate for the agreement service pricing record that matches your criteria becomes the transaction price for work that is covered by the agreement line.

For support agreements, the functionality is similar. You can create agreement pricing and agreement case pricing records that define support rates for specific products. When you create a support agreement, the same logic (used in field service agreements) is also used in support agreement to retrieve base line price.

Related Links

Establishing Pricing Records

Line Price Calculations

This topic describes line pricing calculations in detail.

Entitlement Adjustment

The CRM system adjusts the base line price or prepaid rate that is retrieved from the pricing record to account for uplifts and discounts that are associated with the entitlements on the agreement line. The uplift and discount percentage values are totaled and applied to the base line price using this formula:

Entitlement Adjusted Base Line Price = Base Line Price x (1 + (sum of entitlement discount and uplift percentage values))

For example, the CRM system returns a base line price of 100 USD for an agreement line with three entitlements. The first entitlement has an uplift of 10 percent, the second an uplift of 15 percent, and the third a discount of 5 percent. The entitlement-adjusted base line price is calculated as:

Entitlement Adjusted Base Line Price = 100 USD x (1 + (0.1 + 0.15 - 0.05)) = 100 USD x 1.2 = 120 USD

Installed Product Quantity

When the agreement purchase option is flat, the entitlement-adjusted price on the agreement line applies to each installed product that is covered by the agreement line. The applicable installed products are listed on the Agreement Line page. To determine the installed product quantity, the CRM system adds the values in the quantity field of each referenced installed product.

Flat Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a flat purchase option, PeopleSoft CRM:

1. Calculates the base line price by adjusting the rate on the agreement pricing record for the number of installed products and agreement duration.

   For example, if the pricing record rate is $20 per year per installed product, the agreement line duration is two years, and there are three installed products, the base line price is $20 x 2 x 3 = $120.

2. Adjusts the base price for entitlement adjustments.

3. Applies any manual adjustments.

   Manual adjustments are either expressed as a percentage or as a dollar amount.

This formula is used:

Final Line Price (for flat rates) = Base Line Price x Entitlement Adjustment + Manual dollar amount adjustment or x Manual percentage adjustment

Prepaid Purchase Pricing Calculation

To calculate the final line price on an agreement line that uses a prepaid purchase option, the CRM system calculates the entitlement adjustment for the line and applies it to the base line price. The prepaid rate does not vary with the duration of the agreement, so there is no need to adjust the base line price to account for agreement duration. The final line price is calculated as:

Final Line Price (for prepaid rates) = Prepaid Rate x Prepaid Quantity x Entitlement Adjustment

Any manual adjustments that exist for the line are also applied to the final line price.

Total Price Calculations

The total price is calculated by adding the final line prices on the associated agreement lines. Additionally, a final uplift or discount percentages can be applied to the base price of the agreement. For example, if the CRM system calculates a base price of 2,000 USD for the agreement and you have entered a discount of 10 percent, the CRM system calculates a total price of 1,800 USD for the agreement.

Price Recalculations

If you modify the entitlements on an agreement line, change the installed product quantity for an agreement line, or update the start and end dates of the agreement line after agreement line pricing has been calculated, the change you made is not automatically reflected in the final line price, though edit messages issued when the user saves a changed agreement will prompt the user to have the system update the price or leave the price unchanged.

In other words, if the values of the variables (for example, entitlement adjustment and agreement duration) that are used to calculate the current final line prices do not match the ones that are captured for the new calculation, the price of the agreement is no longer accurate. You can then recalculate the final price for the agreement lines as needed and update the total agreement price for the agreement.

Uncoupling Service Pricing from an Agreement

PeopleSoft CRM enables you to uncouple service pricing from an agreement for PeopleSoft Support and PeopleSoft Integrated FieldService. This enables you to define prepaid agreement with zero pricing, without having to set up service pricing first.

In addition to the *External* and *Internal* agreement categories, there is an agreement category called *External – No Pricing.* This category enables you to set up prepaid agreements without pricing. To create a flat zero dollar agreement, you can use either the *External* or *External – No Pricing* agreement category.

PeopleSoft CRM, however, recommends using the *External – No Pricing* agreement category, as the system bypasses the pricing logic and does not display a pricing warning message. This enables you to create an unlimited number of cases or service orders. To create a prepaid agreement with no pricing, use the *External – No Pricing* category. The system hides the **Order Capture Created** check box in the agreement header, but you can still define prepaid purchase options.

By having the **Prepaid Quantity** field on the agreement header level, it enables you to have a pool of prepaid quantities per agreement across agreement lines. The system displays the prepaid fields only when the category is *External – No Pricing.*

Once a prepaid agreement is active and used on a case or service order, changing the prepaid quantity will not do anything. The system sets the **Prepaid** section to read only after the agreement has been used by the case or service order, when the remaining quantity is less than the prepaid quantity. When the agreement is renewed, the system uses the same prepaid quantity, remaining quantity, and prepaid total as the old line.

The **Product** grid displays the prepaid purchase option defined for each product. The prepaid option at the agreement header level and the **Product** grid level cannot coexist, however. You need to either define the total pool of prepaid purchase options for the whole agreement or the prepaid purchase options per product.

In addition, you can define the prepaid option on the line level for service-related agreements. For service-related agreements, the prepaid option can only be specified on the agreement header, line level, or product level. For support-related agreements, you can only specify the prepaid option on the agreement header or the product level. The prepaid option on the line level doesn't apply to support-related agreements, it only applies to service-related agreements.

Defining Service Levels

This topic provides an overview of service levels and service level suspensions.

Pages Used to Define Service Levels

Page Name	Definition Name	Usage
Service Level Page	RF_SERVICE_LEVEL	Define the authorized hours of operations or prime period of maintenance. These service levels are informational only.
Cost Category Definition Page	RF_SLVL_COSTCAT	Create additional cost categories for the service level.

Understanding Service Levels

You can define the hours of operation or prime period of maintenance for the services that your organization offers. For example, you may provide some services only during a 40-hour work week, whereas other services may be provided 24 hours a day.

You can define entitlements for specific service levels, which can then be included on a customer's agreement. When an agreement line with service level entitlements is selected for a case or service order, the system displays the calculated response and restore time.

Note: In general, you can define service levels for each time zone that is covered by your organization. PeopleSoft, however, strongly recommends that you not reset the base time zone in PeopleTools after your system is running and your applications are in production. Resetting the base time zone can cause time reports to be incorrect.

If you reset the base time zone (go to **PeopleTools** > **Utilities** > **Administration** > **PeopleTools Options**), your users will need to recreate all time-frame related data and update each record to reset the correct time frame for the new base time zone. Users can change the time zone for a particular agreement if they want to display time differently. If users continuously change time zones, however, the system will lose track of what the base time zone is at the time the record is saved (since all time-zone related fields on PeopleTools are stored against the base time zone).

Service Level Page

Use the Service Level page (RF_SERVICE_LEVEL) to define the authorized hours of operations or prime period of maintenance.

These service levels are informational only.

Navigation:

Set Up CRM > **Common Definitions** > **Entitlements** > **Service Level** > **Service Level**

To define service levels, use the Service Level (RF_SERVICE_LEVEL) component.

This example illustrates the fields and controls on the Service Level page (1 of 2).

This example illustrates the fields and controls on the Service Level page (2 of 2).

Field or Control	Description
Service Level	Displays the name of the service level that you entered when the service level record was created.
Description and Short Description	Enter a long and short description. Because these descriptions are displayed in entitlements in which the service level is referenced, enter a meaningful service level description.
Time Zone	Select the appropriate time zone for the authorized hours of operations that you define for the service level. The CRM system populates the time zone code that you select next to the time values that you enter in the **Defaults** and **Service Level Details** group boxes. After you save the service level record, the time zone for the service level cannot be changed.

Field or Control	Description
Cost Category Code	Select the cost category code that should apply for work performed during the days and times specified on this page.
Holiday Schedule	Select the holiday schedule that you want to apply to the service level. The system takes holidays into account when calculating required start and end dates for scheduled work. By default, the system places the holiday schedule after the Entitlement grid on the Agreement Line page. Users can override it or clear it out. For platinum customers you can override holiday schedules by clearing them out on agreement lines. The holiday schedule is based on specific dates, so each year you need to modify your existing holiday schedules with new dates or create new ones to re-prompt from the service level and agreement lines. PeopleSoft CRM recommends that administrator update existing dates, especially when re-prompts may affect a large number of agreement lines.

Defaults

Enter the begin and end times for the weekdays and weekend days that you want the system to use for the service level. When you click the **Apply Defaults** button, the system enters the hours in the appropriate fields displayed in the **Service Level Details** group box.

Service Level Details

This group box displays the begin and end times for the days of the week associated with the service level. You may change the hours displayed in the fields or clear them all by clicking the **Clear** button.

Cost Category Definition Page

Use the Cost Category Definition page (RF_SLVL_COSTCAT) to create additional cost categories for the service level.

Navigation:

Set Up CRM > **Common Definitions** > **Entitlements** > **Service Level** > **Cost Category Definition**

This example illustrates the fields and controls on the Cost Category Definition page.

If you charge different rates for the hours and days worked that were not defined on the Service Level page, use the fields on this page to define additional days, hours and cost categories.

For example, if you charge time-and-a-half for work performed on Saturday, select *Saturday* from the **Day of the Week** field, enter the hours in the **Start Time** and **End Time** fields, and then the select *HALF* as the cost category.

Defining Entitlements

This section provides an overview of entitlements and discusses how to define entitlements.

Page Used to Define Entitlements

Page Name	Definition Name	Usage
Entitlements Page	RF_ENTITLEMENTS	Define entitlements that can be offered on agreements and warranties.

Understanding Entitlements

You define an entitlement record for every response time, restore time, coverage type, or service level that your company intends to offer on customer agreements or warranties. By using the Agreement component, you select the entitlement records that describe what the customer is contractually owed for the service or support offering on each line of the customer's agreement.

Similarly, when defining warranties with the Warranty component, you select the entitlements that are contractually owed to customers who have an installed product that is covered by a valid warranty.

Each entitlement record can specify an uplift or discount to adjust the base price of agreement lines that include the entitlement. When the CRM system calculates the final line price of the agreement line, it adjusts the base line price to reflect the sum of the uplift and discount values that are associated with the entitlements on the line.

To define entitlements, use the Entitlements (RF_ENTITLEMENTS) component.

Entitlements Page

Use the Entitlements page (RF_ENTITLEMENTS) to define entitlements that can be offered on agreements and warranties.

Navigation:

Set Up CRM > **Common Definitions** > **Entitlements** > **Entitlements** > **Entitlements**

This example illustrates the fields and controls on the Entitlements page.

Field or Control	Description
Description	Enter a description. You can use up to 30 alphanumeric characters.
	Important! Entitlement descriptions are displayed at the time of service order and case entry. Enter descriptions that are meaningful to the person who enters the service order or case. Typically, the entitlement description describes the response time, restore time, coverage, or service level that is contractually owed to the customer per the specified agreement line or warranty. For example, you may want to include the time zone of a service level in its description.
Uplift/Discount	Enter the percentage of uplift or discount to add to the price of agreement lines that include this entitlement. Enter discounts with a minus sign that precedes the amount; enter uplifts without a minus or plus sign.

Entitlement Type

Specify the category of entitlement that is defined by the entitlement code together with the entitlement details that are associated with the selected category.

Field or Control	Description
Guaranteed Response and Minutes	Select to entitle the customer to a response within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed response time to calculate the start date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred start date and time for service orders based on this information. Call center cases also display and use the guaranteed response time from an associated agreement line entitlement.
Guaranteed Restore and Minutes	Select to entitle the customer to restored functionality of the product within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed restore time to calculate the committed end date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred end date and time for service orders based on this information. The service order can have several types of begin and end times. The guaranteed restore entitlement is used to calculate the committed end date and time. Other end times include *customer preferred,* which are optional fields that are manually entered if the customer has a preferred date and time for service, such as a weekend. There are also *planned* end dates and times, which refer to the expected completion of each activity within a service order that are based on service begin type and activity duration. Call center cases also display and use the guaranteed restore time from an associated agreement line entitlement.
Service Level	Select to entitle the customer to a specific service level or prime period of maintenance. Service levels are established on the Service Level page. PeopleSoft Integrated FieldService uses the service level that is specified in the entitlement to calculate the start and end dates and times for service orders, if the automatic calculation feature is enabled at the business unit level. Service levels from an associated agreement line entitlement (in conjunction with guaranteed response or restore minute entitlements) are also used to calculate specific response and restore times for a call center case.

Field or Control	Description
Guaranteed Coverage	Select to entitle the customer to a percentage of a specific type of coverage for a specific amount of time. When defining an entitlement for guaranteed coverage, select a coverage type, define the percent covered, and specify a time frame by entering a numeric value in the **Length** field and defining an appropriate unit, either *Day, Week, Month,* or *Year*.
Coverage Type	Select a coverage type if you select *Guaranteed Coverage* as the entitlement type. Values are: *Expenses:* The portion (specified in the **Percent Covered** field) of any expenses that are associated with completing the customer's service order that is not charged to the customer. *Material:* The portion (specified in the **Percent Covered** field) of the cost of any materials that are required to complete the customer's service order that is not charged to the customer. *Time:* The portion (specified in the **Percent Covered** field) of the cost of any labor required to complete the customer's service order or case that is not charged to the customer.

Related Links

Defining Service Levels

"Setting Up Automatic Calculation of Dates and Times for Service Orders" (PeopleSoft Integrated FieldService)

Defining Entitlement Plans

This section provides an overview of entitlement plans and discusses how to define entitlement plans.

Page Used to Define Entitlement Plans

Page Name	Definition Name	Usage
Entitlement Plan Setup Page	RF_ENTITLE_PLAN	Define groups of entitlements that can be referenced and populated quickly on agreements and warranties.

Understanding Entitlement Plans

Use entitlement plans as default values on agreements or warranties. You can reference a relevant entitlement plan to quickly populate an agreement or warranty with the entitlements that are associated with the plan. You can then delete or add other entitlements as necessary.

To define entitlement plans, use the Entitlement Plan Setup (RF_ENTITLE_PLAN) component.

Entitlement Plan Setup Page

Use the Entitlement Plan Setup page (RF_ENTITLE_PLAN) to define groups of entitlements that can be referenced and populated quickly on agreements and warranties.

Navigation:

Set Up CRM > **Common Definitions** > **Entitlements** > **Entitlement Plan** > **Entitlement Plan Setup**

This example illustrates the fields and controls on the Entitlement Plan Setup page.

You can create new or update existing entitlement plans by adding or removing entitlement entries from the plan. When you reference an entitlement plan on an agreement, the system automatically populates the plan's associated entitlement entries to the agreement.

The system, however, does not retroactively update individual entitlements on existing agreement lines or warranties when the corresponding entitlement plan used to create those entries is updated.

For example, if an agreement line was created with an entitlement plan which originally had a response entitlement of *A* and a restore entitlement of *B,* and that plan is subsequently changed to refer to a restore entitlement of *C* rather than *B,* the existing agreement line will still have the original two entitlement values.

Entitlement Plans are only used to default individual entitlements onto other new objects, such as agreement lines or warranties. These individual entitlements may then be modified by the user at any time, and are no longer determined or reset by any changes to the corresponding entitlement plan.

Note: An entitlement plan must have at least one entitlement associated with it.

Related Links
<u>Defining Entitlements</u>

Configuring the CRM System for Agreement Searches

This topic provides an overview on agreement searches and discusses how to configure agreement searches.

Page Used to Configure Agreement Searches

Page Name	Definition Name	Usage
<u>Agreement Search Configuration Page</u>	RF_AG_SRCH_CFG	Define how the system will search for agreements.

Understanding Agreement Searches

The Agreement Search Configuration page enables you to configure how the agreement search should function for PeopleSoft Support cases (external case agreement search), PeopleSoft HelpDesk cases (internal case agreement search) and PeopleSoft Integrated FieldService service orders (service order agreement search).

For external and internal agreements, there are separate group boxes for cases and service orders that enable you to instruct the system on how to search for agreements using these options:

- Autoselect the shortest response time from all matches.

- Autoselect the longest response time from all matches.

- Enable the user to choose from all matches.

- Match using case criteria.

If you select **Match Using Case Criteria** for external agreements (PeopleSoft Support), the system enables you to select case category, case priority, case source, case type, and customer value as the values for the Category field.

If you select **Match Using Case Criteria** for internal agreements (PeopleSoft HelpDesk), the system enables you to select department, location, priority, role, and source (inbound contact method) as the values for the Category field.

If you do not select the **Match Using Case Criteria** check box, the system performs the matching based on the radio button you selected. This means that if any agreement lines exist that specify values (criteria), the agreement matching engine ignores those values when selecting matches.

If you select the **Match Using Case Criteria** check box, the pool of agreement line matches will include any matches based on the criteria in the case and the corresponding criteria on the agreement lines. If two or more lines tie for the shortest or longest response, the system displays all agreement lines to the user.

To be considered a match, the criteria from a case may match any of the criteria conditions listed on the agreement line. For example, if an internal agreement line specifies that it is for high priority cases and the role is supervisor, the system matches the case with this line if the employee's role is supervisor, regardless of whether the case priority is high or not.

If a product is specified on the case, the system matches only agreement lines that have the product and at least one criteria. The system will also match default agreement lines that have no products that match on at least one criteria (if any criteria are present on the agreement line).

The system then filters the pool of agreement lines (and warranties) that are found under this option for presentation to the user according to the radio button option that was selected on the Agreement Search Configuration page.

Note: Because PeopleSoft CRM no longer bases search results on the category weight factor, customers upgrading from a previous release may find that the agreement searching functionality for PeopleSoft HelpDesk may produce slightly different results. Also, now that the system sorts the total list of warranty and agreement line matches by response time, warranty matches do not always appear first in the list of results.

You can use a variety of agreements and agreement line values to set up your PeopleSoft CRM system. These tables summarize the main options that are available:

External Agreement Line Characteristics	*Comments*
• No Product • No Service • No Installed Product • No Criteria	This default agreement line will always apply regardless of the product or installed product that is linked to the case or service order. This line cannot be priced. It is permitted only for the External - No Pricing agreement category.
• Product = 123 • No Service • No Installed Product • No Criteria	This agreement line applies to any case for product 123, regardless of the installed product value on the case.
• Service = ABC • No Product • No Installed Product • No Criteria	This agreement line applies to any service order, assuming that a service has not been selected on the service order. If a service has already been selected on the service order, this agreement line will only be a match if the service is the same in both places. **Note:** The Service ID from a service order will be included as part of the matching criteria when selecting entitlements from the service order.

External Agreement Line Characteristics	*Comments*
• Product = 123 • Installed • Products = 456, 789 • No Service • No Criteria	This agreement line applies to any case with matching product and installed product values.
• Product = 123 • No Service • No Installed Product • Priority = Medium • Customer Value = Silver	This agreement line applies to any case for the product (regardless of the installed product) where the case priority is medium or the customer value is silver.
• Product = 123 • No Service • Installed Products = 456, 789 • Priority = High • Customer Value = Gold	This agreement line applies to any case that is linked to product 123 and installed product 456 or 789, where the case priority is high or the customer value is gold.
• No Product • No Installed Product • No Service • Priority = High	This agreement line applies, regardless of whether the product or the installed product is linked to the case, as long as the case priority is high. This line cannot be priced.
• Product = 123 • Service = Repair Widget • No Installed Product • No Criteria	This agreement line applies to any service order for product 123, regardless of the installed product, assuming that the service has not been selected on the service order, or has already been selected as *Repair Widget*.
• Product = 123 • Service = Repair Widget • Installed Product 456, 789 • No Criteria	This agreement line applies to any service order for product 123 and installed product 456 or 789, assuming that the service has not been selected on the service order, or has already been selected as *Repair Widget*.

Note: Customer, PIN, Person, SIN and Site Matching also apply for customer-based agreements in addition to comments in the table above.

Internal Agreement Line Characteristics	Comments
• No Product • No Installed Asset • No Criteria	This default agreement line applies, regardless of the product or installed asset that is linked to the case.
• Product = 123 • No Installed Asset • No Criteria	This agreement line applies to any case for the product, regardless of the installed asset value on the case.
• Product = 123 • Installed Assets = 456, 789 • No Criteria	This agreement line applies to any case that matches the product and installed asset values.
• Product = 123 • No Installed Asset • Priority = Medium • Source = Phone	This agreement line applies to any case that is linked to the product (regardless of installed asset), where the case priority is medium or the source is phone.
• Product = 123 • Installed Assets = 456, 789 • Priority = High • Department = HR	This agreement line applies to any case that is linked to product 123 and installed asset 456 or 789, where the case priority is high or the department is HR.
• No Product • No Installed Asset • Priority = High	This agreement line applies, regardless of the product or installed product that is linked to the case, as long as the case priority is high.

Agreement Search Configuration Page

Use the Agreement Search Configuration page (RF_AG_SRCH_CFG) to define how the system will search for agreements.

Navigation:

Set Up CRM > **Common Definitions** > **Agreement Search Configuration** > **Agreement Search Configuration**

This example illustrates the fields and controls on the Agreement Search Configuration page (1 of 2).

This example illustrates the fields and controls on the Agreement Search Configuration page (2 of 2).

Note: The group boxes that appear on this page are dependent on which PeopleSoft applications you have installed. For example, the **External Case Agreement Search** group box appears only if you have PeopleSoft Support installed. The **Internal Case Agreement Search** group box appears only if you have PeopleSoft HelpDesk installed. The **Service Order Agreement Search** group box appears only if you have PeopleSoft Integrated FieldService installed.

External Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the **Select Agreement or Warranty** link on the Case page in PeopleSoft Support.

The values include:

- User Selects From All Matches

  The system displays all matches in the pool of agreements or warranties.

- Autoselect Shortest Response

  The system displays only the matches from the pool of agreements or warranties with the shortest response.

- Autoselect Longest Response

  The system displays only the matches from the pool of agreements or warranties with the longest response.

Note: If you select either the Autoselect Shortest Response or Autoselect Longest Response agreement search option for cases (or service orders), and an AAF policy is defined and enabled in the CRM system to return a list of applicable agreements when products are selected on that type of cases (or service orders) for the same setID, the agreement search option takes precedence over what is defined in the corresponding AAF policy. In this example, the system returns the agreement with either the shortest or longest response time when a product is selected in an opened case (service order).

Field or Control	*Description*
Match Using Case Criteria and **Category**	If you do not select the **Match Using Case Criteria** check box, the system performs the agreement search based on the radio button that you select.
	If you select the **Match Using Case Criteria** check box, the system includes agreement lines that match the criteria that you select in the **Category** field and the radio button that you select.
	For example, if case priority and customer value are listed on the Agreement Search Configuration page, and the agreement line specifies it is for *high* priority cases, or cases whose customer value is *platinum,* the system still matches a high priority case to this agreement line regardless of customer value. The case criteria on an agreement line don't all have to match the values on a case to be considered a match. It is sufficient for just one criteria to match.
	If a product is specified on the case, the system matches only agreement lines that match the product and at least one criteria.
	The system matches agreement lines to the case for default agreement lines that have no products but match on at least one criteria, if any criteria are present on the agreement line.

Internal Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the **Select Agreement or Warranty** link from the Case page in PeopleSoft HelpDesk.

The system returns all applicable default lines even when there is another match based on product or installed product. PeopleSoft designed the system to do this to give agents the option of selecting an agreement based on a completely different set of criteria.

For example, if you have one agreement line that covers a pocket PC and another default line to cover the role of CEO that does not have a product specified but has a better response time, the system displays both lines. This gives the agent the ability to select either line.

If you select the **Match Using Case Criteria** check box, you must select one or more categories that you want the system to use in its search. Refer to the previous topic for a fuller explanation on using the **Match Using Case Criteria** and **Category** fields.

Service Order Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the **Select Agreement or Warranty** link from the Service Order page in PeopleSoft Integrated FieldService.

Defining Agreement Templates

To define agreement templates, use the Agreement Template (RF_AGREETEMP) component.

This topic provides an overview of agreement templates.

Pages Used to Define Agreement Templates

Page Name	Definition Name	Usage
Agreement Template Page	RF_AGREETEMP_HDR	Define basic header and billing information for agreement templates.
Line Defaults Page	RF_AGREETEMP_ENTL	Define a set of entitlements to use as default values for the entries that are added on the Template Line page.
Template Line Page	RF_AGREETEMP_LINE	Define default agreement lines.

Understanding Agreement Templates

You can define model agreements for specific types of customers, products, or services. When you define an agreement for a specific customer by using the Agreement component, you can reference an agreement template to populate the basic agreement information and then make modifications as necessary.

Note: You can create templates with specific values for certain agreement criteria. However, if you create more than one agreement from the same template, you should change at least some of the criteria that you copied from the template; otherwise, you would have two identical agreements in your system.

Agreement Template Page

Use the Agreement Template page () to define basic header and billing information for agreement templates.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreement Templates** > **Agreement Template**

This example illustrates the fields and controls on the Agreement Template page.

Field or Control	Description
Agreement Category	This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select *External* or *External - No Pricing* as the agreement category. **Note:** If you select *External - No Pricing* as the agreement category, the system only displays the **Status Information** and **Coverage** sections.

Internal Agreement Type

This group box appears only if you select the *Internal* agreement type. Select one or both of the **HR Help Desk** or **IT Help Desk** check boxes to designate the types of cases to which the agreement applies.

Status Information

Use the fields appearing in this group box to select the scope and status for the agreement template you are defining.

Note: If you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category, only the Status field appears on this page.

Field or Control	Description
Scope	Select either *Site* or *Contact* to indicate the scope of the agreement template. If you select *Contact,* enter the number of contacts in the **Maximum Contacts** field. **Note:** PeopleSoft Integrated FieldService only uses *Site* as the scope for this type of agreement for service orders. PeopleSoft call center applications can use either *Contact* or *Site* as the scope.
Status	Select the status of the agreement: *Pending, Active,* or *Closed.* There are no system processes that change the status value of the agreement template, but you can manually change the status as necessary. You can only use templates with a status of *Active* to create a new agreement.

Coverage

Select the provider group and provider group member that you want the system to use for the agreement template.

Billing Information

Select the payment terms and payment method that you want the system to use for billing for agreements using the agreement template.

Related Links

Understanding Entitlement Searches

Line Defaults Page

Use the Line Defaults page (RF_AGREETEMP_ENTL) to define a set of entitlements to use as default values for the entries that are added on the Template Line page.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreement Templates** > **Line Defaults**

This example illustrates the fields and controls on the Line Defaults page.

Field or Control	Description
Entitlement Plan Name	Select a default entitlement plan. Plans are established on the Entitlement Plan Setup page. The system displays the entitlements in the plan. You can add or delete entitlements to create a specific list for this template. The PeopleSoft CRM system displays the information that is associated with each entitlement as defined on the Entitlements page. **Note:** Setting up plans is optional. You can add individual entitlements directly to the grid. The individual entitlements listed on this page will be defaulted onto each new agreement template line entry that is created from that template.

Related Links

Defining Entitlements

Defining Entitlement Plans

Template Line Page

Use the Template Line page (RF_AGREETEMP_LINE) to define default agreement lines.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreement Templates** > **Template Line**

This example illustrates the fields and controls on the Template Line page.

Agreement Line Details

Add rows for each new line.

Field or Control	Description
Line Number	Displays the agreement line number. The CRM system automatically increments this number for each row that you add. The agreement line number and description appear on cases that are covered by the agreement line entitlements. Service orders only display the agreement name, not line number.
Service	Select the service that is covered by the agreement line. For Field Service agreements, select a service. Support agreements do not reference services. You define services by using the Service component. The PeopleSoft CRM system prompt displays only services with an active status and for which the **Agreement** check box has been selected on the Service page. **Note:** Since there is no start date on the Template Line page, the system validates that the agreement start date occurs between the offer start date and the offer end date defined for the service on the Agreement Line page, not the Template Line page.

Internal agreement templates also require you to designate the person type and person status. The system uses these to select the agreements that apply to the case. For example, if a contingent worker in active

status opens an IT Help Desk case, only agreement lines that have a person type of *Contingent Worker* and a status of *Active* apply.

Service Pricing Details

Define the default criteria for retrieving pricing records for an agreement line.

Field or Control	Description
Purchase Options	Select the purchase options that you want the system to use for the agreement template.
Prepaid Quantity	Enter the number of work units of a service or support offering that a customer pays for in advance. This value only applies to the *Prepaid* purchase option.
Product, Purchase Options and **Prepaid Quantity**	Select the product covered by the agreement line, the purchase option, and the prepaid quantity. If you select a service, the CRM system prompt displays all the products that are defined for the service. If no service is selected, the system prompt displays all products that are defined in it. Products are established with the Product enterprise integration point (EIP) or the Product Definition component.

Entitlements

Displays the entitlements that are contractually owed to the customer for this agreement line. This information is initially populated by using the Entitlement Defaults page. The user, however, can modify the entitlements for each line.

Entitlements Apply To

This group box appears only if you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category. Also, the system displays a set of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

For example, if you selected the **Match Using Case Criteria** check box and then selected *Role, Department, Priority, Source,* and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that can appear on the Case page. For example, if you set the priority for the agreement to low, and a user selects the **Select Agreement** link on a low priority case, the system displays the respond and restore times that you set up on the Entitlement Defaults page.

If you select *User Selects From All Matches, Autoselect Shortest Response,* or *Autoselect Longest Response,* on the Agreement Search Configuration page, the system does not display this group box.

Related Links

"Understanding Products in PeopleSoft CRM" (PeopleSoft Product and Item Management)

"Defining Services" (PeopleSoft Integrated FieldService)

Defining Agreements

This topic provides an overview of agreement definitions.

Pages Used to Define Agreements

Page Name	Definition Name	Usage
Agreement Page	RF_AGREEMENT_HDR	Define agreement header information.
Agreement - Scope Details Page	RF_AGREEMENT_COV	Specify people that are entitled to call center support or customer sites that are entitled to the service that is detailed by agreement lines.
Agreement - Line Defaults Page	RF_AGREEMENT_ENTL	Specify the default values to appear on rows that are added on the Agreement Line page.
Agreement - Agreement Line Page	RF_AGREEMENT_LINE	Define detailed agreement line information for each service or support offering.
Agreement - Billing Page	RF_AGREEMENT_BILL	Define agreement billing information.

Understanding Agreement Definitions

When you create a case or service order for a customer and click the **Select Agreement or Warranty** button, the CRM system searches for agreement lines or warranties that cover the case or service order and displays the associated entitlements.

The CRM system uses the values that you have entered in the fields for product ID, serial number, and either site or SIN to search for agreement line and warranty matches for service orders.

For cases, the CRM system uses the same fields, as well as those for contact or PIN. For both cases and service orders, the entitlement match page also displays any transaction price information that is defined under the terms of the agreement.

Internal agreements define the levels of service that are available to Help Desk and HR Help Desk cases. These cases use the additional information of organizational relationship, as defined by the person type, and worker status to locate and display the levels of service that are defined on the agreement.

External - No Pricing agreements are similar to External agreements, except they do not display pricing-related fields, only prepaid amounts. Using External - No Pricing agreements enables you to specify how many free prepaid cases or services, or hours of support, a customer is entitled to on an agreement. For PeopleSoft Support, you can specify *prepaid* at the agreement header level or in the product grid on the agreement line. For FieldService, you can specify *prepaid* on the agreement header, agreement line for service, or on the product grid on the agreement line.

Related Links

Understanding Agreement Pricing

Understanding Entitlement Searches

"Service Order Toolbar Functions" (PeopleSoft Integrated FieldService)

Agreement Page

Use the Agreement page (RF_AGREEMENT_HDR) to define agreement header information.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreements** > **Agreement**

This example illustrates the fields and controls on the Agreement page (1 of 3).

This example illustrates the fields and controls on the Agreement page (2 of 3).

This example illustrates the fields and controls on the Agreement page (3 of 3).

Default Provider Group

Provider Group Hardware Western   Group Member

Renew Agreement

▶ Audit History

Field or Control	Description
Agreement Category	This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select either *External* or *External - No Pricing* as the agreement category. **Note:** In the top section of this page the system changes the field label to **Category.**

Copy From Agreement Template

When you create a new agreement, you can either add all the information to it manually, or base it on an agreement template.

Note: This group box does not appear if the agreement has already been created and saved.

Field or Control	Description
Copy from Template and **Template ID**	Select a template and then click the **Copy from Template** button to populate the agreement with information that is established in the selected agreement template. **Note:** Because the integration with PeopleSoft Contracts requires certain validations before a user can set the status of an agreement to *Active,* the system does not copy the value of the **Status** field from the agreement template to the new agreement. The system initially sets the status of the new agreement to *Pending.* A user can change the status of the agreement to *Active* by taking certain actions; but they cannot create a new agreement with a status of *Active* by copying information from an agreement template.

Agreement Information

Field or Control	Description
Renewal Number	Displays the renewal version of the agreement. When an agreement is first created, this value is set to *1*. Each time you renew the agreement by clicking the **Renew Agreement** button, the CRM system increments this value by 1.
Scope and **Maximum Contacts**	Select either *Site* or *Contact* to indicate if the agreement applies to sites or callers (contacts). If you select *Contact,* enter the maximum number that would be allowed to call within the scope of the agreement. **Note:** These fields do not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.
Status	Select from *Pending, Pending Activation, Action Required, Active,* or *Closed.* There are no system processes that change the status value of the agreement, but you can manually change the status. When an entitlement search is performed for a case or a service order, the CRM system includes only agreements with an *Active* status that are effective on the date that the search is performed. **Note:** When renewing an agreement, you should manually adjust the status of the old agreement to *Closed* on the date that it expires and ensure that the status of the new agreement is set to *Active.* For example, if you renew an agreement one week before it expires, the new agreement should have a status of *Pending Activation,* and the old agreement should retain its status of *Active* until the renewal date matches the current date. At that point the old agreement status should be set to *Closed,* and the new agreement status should be set to *Active.* If you have an integration with PeopleSoft Transaction Billing Processor, the system makes the *Pending Activation* and *Action Required* statuses available. Additionally, if you are using this integration, the system changes the status from *Pending Activation* to *Active* or *Action Required* based on the success you have creating a corresponding entry in PeopleSoft Transaction Billing Processor.

Field or Control	Description
Order Capture Created	If this check box is selected the agreement was created through PeopleSoft Order Capture.
Contract Details	Click this link to go the Contract Information page. Use this page to view contract information associated with the contracts business unit, general ledger business unit, and contract details. This applies only when integrating to the Contracts module in PeopleSoft Financials.

Internal Agreement Type

This section appears on the page for internal agreements only.

Customer Information

This section does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Field or Control	Description
Customer	Click the **Search** button to select the name of the customer. Customers are established by using the Customer EIP, the Company component (select **Customers CRM** > **Add Company**) or the Consumer component (select **Customers CRM** > **Add Person**).
Contact	Click the **Search** button to select the name of the customer's agent. This is the person to contact about agreement administration issues, such as renewing and remitting payment for agreements. You define contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component.
Contact Site	Select the customer site that is associated with the contact. You establish this relationship by using the Customers page of the Contact component. **Note:** The prompt for this field shows only sites that are associated with the contact.

Field or Control	Description
Prefix, Phone, and **Extension**	Enter the telephone information for the customer's contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the person's role as a customer's contact. You can modify this information as needed.

Contact Information

These fields appear on the page only if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

The contact fields on the main Agreement page for internal agreements are functionally similar to the customer contact fields mentioned above for external agreements. They refer to the person to contact about the agreement administration issues.

Some users may mistakenly assume that the contact listed on the main page of an internal agreement represents the person or worker for whom the agreement was created, or who was covered by the agreement. This field is only used to represent the administrative contact for the internal agreement.

Field or Control	Description
First Name, Last Name, Phone, Location and **Search**	Click the **Search** button to select the name of the contact. You define contacts by using the Workforce component (select Workforce, Create Worker).
Prefix, Phone, and **Extension**	Enter the telephone information for the contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the contact. You can modify this information as needed.

Default Provider Group

Enter the default provider group and group member that get assigned to perform the services that are covered by this agreement. These default values apply to service orders only; they do not apply to cases.

Note: This group box does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Related Links

Defining Agreement Templates

Understanding Entitlement Searches

"Understanding the Company Component" (Business Object Management)

"Defining Consumer Information" (Business Object Management)

Agreement - Scope Details Page

Use the Agreement - Scope Details page (RF_AGREEMENT_COV) to specify people that are entitled to call center support or customer sites that are entitled to the service that is detailed by agreement lines.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreements** > **Scope Details**

This example illustrates the fields and controls on the Agreement - Scope Details page.

This page varies depending on the scope that is specified on the Agreement page. For agreements with the contact scope, you enter the people who are eligible for support. These agreements are only available to PeopleSoft Support. For agreements with the site scope, you enter sites that are eligible for service. These agreements are available to both PeopleSoft Support and PeopleSoft Integrated FieldService.

Note: This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Named Callers

This grid appears if the selected agreement has a scope of contact. Enter the people who are eligible to request support that is related to this agreement.

Field or Control	Description
Primary	Select if this person is the primary caller.

Field or Control	Description
Name	Enter the name of a person who is entitled to request support that is defined by the agreement lines. Named callers must first be established as contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component. The number of contacts that you specify cannot exceed the number of maximum contacts that are recorded on the Agreement page. **Note:** For consumer agreements with scope as the contact, the CRM system populates the first row of the **Named Callers** grid with the name of the customer that is specified on the Agreement page. You can change this value or add additional rows.
PIN (personal identification number)	Displays a unique value that is generated by the CRM system for each caller when the agreement is saved. Customers calling to request support under the terms of the agreement provide their PIN to your customer service representative (CSR). The CRM system uses the PIN that the CSR enters on cases to identify the agreement that defines the customer's entitlements. **Note:** The PIN is unique for every person within an agreement. If a person is a named caller on two agreements, this person is assigned two PINs.

Valid Sites

This grid appears if the selected agreement has site as the scope. Enter customer sites that are eligible to receive support or services specified on its agreement lines.

Field or Control	Description
Site Name	Enter the name of the site that is covered by this agreement. The CRM system displays the site ID of the selected site automatically.

Field or Control	Description
SIN (site identification number)	Displays a unique value that is generated by the CRM system for each site when the agreement is saved. Customers calling to request service under the terms of the agreement provide the SIN to your CSR. The CRM system uses the SIN that the CSR enters on cases or service orders to identify the agreement line that defines the customer's entitlements for a particular site. **Note:** The SIN is unique for every site within an agreement. If a site is valid on two agreements, the site is assigned two SINs.

Related Links

"Understanding Sites" (Business Object Management)

Agreement - Line Defaults Page

Use the Agreement - Line Defaults page (RF_AGREEMENT_ENTL) to specify the default values to appear on rows that are added on the Agreement Line page.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreements** > **Line Defaults**

This example illustrates the fields and controls on the Line Defaults page (1 of 2).

This example illustrates the fields and controls on the Agreement - Line Defaults page (2 of 2).

Person Type	Worker Status
☑ Employee	☑ Active
☑ Contingent Worker	☐ Inactive
☐ Person of Interest	
▶ Audit History	

Note: If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the **Coverage Type, Percent Covered, Coverage Duration** and **Uplift or Discount** fields. The group boxes with the Person Type and Worker Status check boxes shown in the example above is only relevant for and displayed for internal agreements. It is not displayed for external or external-no pricing agreements

Default Entitlements

Field or Control	Description
Entitlement Plan Name	Select a default entitlement plan to populate the grid initially. You define entitlement plans on the Entitlement Plan Setup page. The list of entitlements in the grid becomes the default entitlement set for each new line that is added on the Agreement Line page. Add or delete entitlements on each agreement line to define the final set of entitlements that is contractually owed to the customer. Each line in the grid is associated with the entitlement information that is defined on the Entitlements page.
Description	Click the **Lookup Entitlement Name** button to locate entitlements that you want to add to the Entitlements grid.

Note: Any changes that you make to the defaults do not affect any existing agreement lines.

Additional Selections for Internal Cases

Field or Control	Description
Person Type	Select the person type. Available choices are *Employee, Contingent Worker,* and *Person of Interest.* **Note:** *Person of Interest* does not appear for IT Help Desk cases.

Field or Control	Description
Worker Status	Select the status of the worker.

Related Links

[Defining Entitlements](#)
[Defining Entitlement Plans](#)

Agreement - Agreement Line Page

Use the Agreement Line page (RF_AGREEMENT_LINE) to define detailed agreement line information for each service or support offering.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreements** > **Agreement Line**

This example illustrates the fields and controls on the Agreement Line - View Line Summary page: View Line Summary link.

This example illustrates the fields and controls on the Agreement - Agreement Line page: Line Details link (1 of 3).

This example illustrates the fields and controls on the Agreement - Agreement Line page: Line Details link (2 of 3).

This example illustrates the fields and controls on the Agreement - Agreement Line page: Line Details link (3 of 3).

Line Entitlements

Entitlements   Personalize | Find | | | First 1-5 of 5 Last

Description	Type	Entitlement Minutes	Service Level	Coverage Type	Coverage Duration	Percent Covered	Uplift or Discount	
Five hour guaranteed resp	Guaranteed Response	300					10	+ −
Eight hour guaranteed rest	Guaranteed Restore	480					10	+ −
Extended Service Level	Service Level		Extended				5	+ −
Extended Expense Covera	Guaranteed Coverage			Expenses	1 Year	50	5	+ −
Extended Material Coverag	Guaranteed Coverage			Material	1 Year	50	5	+ −

Holiday Schedule [ ]

Calculate Final Line Price

Base Price	325.00 USD
Entl. Adjustmnt	35.00 %
Subtotal	438.75 USD
Adjustment (%) [- ▼]	%
Adjustment (Amt) [- ▼]	USD
[▼]	Other
Final Line Price	438.75 USD

[Calculate Final Price]

This example illustrates the fields and controls on the Agreement - Agreement Line page: Installed Products link.

Agreement

[Save] | Search | Add Agreement | Next | Previous | 360-Degree View | 360-Degree Search   Personalize

Agreement Code AGR-315-COM   SetID CRM02
Customer Global Payment Network   Customer Value Gold ★★★★
Contact   Status Active
Category External   Scope Site

| Agreement | Scope Details | Line Defaults | Agreement Line | Billing |
Line Summary | Line Details | Entitlements | Inst. Products | Sites | Price

Agreement Line Details   Find | View All   First 1 of 2 Last   + −

                    Line 001   Status 2-Active   [▼]
              *Start Date 01/01/2001 [31]   *End Date 12/31/2010 [31]
              Description Repair PC
                  Service Repair services for PCs
                          Billing Information

Products Under Service   Personalize | Find | View All | | | First 1-4 of 4 Last

	Installed Product ID	Description	Serial Number	Asset Tag	Quantity	Site
☐	INS0000012	ITN Notebook PC Pentium with D	SR-ID-125487		1.0000	Mountain View
☐	INS0000013	ITN Notebook PC Pentium with D	SR-ID-125488		1.0000	Pleasanton
☐	INS0000014	ITN Notebook PC Pentium with D	SR-ID-125489		1.0000	Pleasanton
☐	INS0000015	ITN Notebook PC Pentium with D	SR-ID-125490		1.0000	San Jose

[Add Installed Product]   [Delete Selected Installed Product]

This example illustrates the fields and controls on the Agreement - Agreement Line page: Entitlements link.

This example illustrates the fields and controls on the Agreement - Sites page.

This example illustrates the fields and controls on the Agreement - Agreement Line page: Price Information link.

Note: If you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement, the system does not display the **Sites** and **Price Information** sub pages and links. If you selected *External - No Pricing* as the agreement category, the system does not display the **Price Information** sub page.

Agreement Line: View Line Summary

If an agreement has multiple agreement lines, they are listed in the Agreement Lines summary grid (available when you click the **View Line Summary** link) with basic information such as agreement line and service descriptions, product name, and product ID number. Click the agreement line number link to access the Agreement Line Details group box, where you can edit and view the corresponding line in detail.

If there is only one line in the agreement, the CRM system displays the Agreement Line Details group box together with pricing, site, entitlements, and product information.

When you click the **Line Details** link at the top of the page, the CRM system displays information for the selected agreement line in group boxes such as **Retrieve Base Line Price, Calculate Final Line Price, Entitlements** and so on. To minimize the need for scrolling, you can click the **Sites, Entitlements, Installed Products,** or **Price Information** links to view corresponding information selectively.

Agreement Line: Line Details - Agreement Line Details

Use this group box to add new lines to the agreement. Enter the status, start and end dates, description and service for the agreement service line. Click the **Billing Information** link to set up the billing schedule, purchase order, and payment terms information for the agreement line.

The **Billing Information** link only appears when the customer is integrating with the Contracts module in PeopleSoft Financials.

Note: For internal agreements (IT Help Desk and HR Help Desk), the **Person Type** and **Worker Status** fields also appear in this section.

Agreement Line: Line Details - Service Pricing

Use this group box to enter purchase option and transactional information for the agreement line service. Click the **Price Definitions** link to access the Service Pricing page.

Agreement Line: Line Details - Products

Use this section to define the products, purchase options, and prepaid quantity (if there is one). The system displays the prepaid rate, base line price, and base line price unit if it is stored in the system.

To view the transaction price for the product, click the Transaction Price tab. This section displays the transaction price on the corresponding agreement service pricing record. The price is based on the service or service-product combination that is defined for the agreement line.

The CRM system matches the value for the service and product fields on the agreement line with a unique pricing record that contains the same service and product values. In addition, this pricing record must contain the appropriate currency code for the agreement line. Never define more than one agreement service pricing record in the Pricing Information page for the same combination of service, product, and currency code, because this implies multiple prices for a single transaction.

You may associate a support-oriented agreement line with multiple products unless you have an integration to PeopleSoft Contracts. In this case you can only have one product per support-oriented agreement line (an agreement line with no Service). If you are not using the Contracts Integration feature, the save-edit check is disabled and you can enter multiple rows of data in the Product grid for the agreement line.

After defining the product and purchase option (prepaid options, if applicable), the other price related fields on this grid are populated when the user clicks the **Calculate Final Price** button.

When you perform an entitlement search from a case or a service order, the CRM system displays the transaction price or the remaining quantity that is defined on the customer's agreement.

Note: A credit card link on support cases is enabled when the associated agreement line includes a price per transaction and does not entitle the customer to 100 percent coverage of time, material, and expenses. Also, many of the fields related to pricing do not appear if you selected *External - No Pricing* as the agreement category.

Field or Control	Description
Purchase Option	Displays the method of purchasing the service or support offering for an agreement or agreement service transaction.
Prepaid Rate, **Prepaid Unit,** **Baseline Price** and **Baseline Price Unit**	Displays the amount paid per unit of work or per unit of time, depending on the purchase option of the agreement. Rates that are retrieved from an agreement service pricing record with a flat purchase option can be by the hour, case, or service order. Rates that are retrieved from an agreement service pricing record with a time and material purchase option can be per unit of time—hour, day, week, month, or year.
Transaction Purchase Option, **Transaction Price Unit,** **Transaction Price,** and **Currency Code**	Displays the transaction purchase option, the price per unit, the total transaction price and the currency. The currency that is displayed for the rate reflects the currency that is entered on the Billing page of this component.
Remaining Quantity	Displays the amount of the prepaid quantity that has not been used. For field service agreements, the prepaid quantity is in units of service orders or hours. For example, the CRM system reduces this quantity each time a user saves a new service order that is covered by the agreement line. If the service order is canceled, the CRM system readjusts the remaining quantity accordingly. For support agreements, the prepaid quantity is in units of cases or hours. Workflow processes must be implemented to update remaining quantity on support agreements.

Agreement Line: Line Details - Valid Sites

Use this section to add any valid sites to the agreement line. The system displays the site ID and description.

Note: Every line of a site-based agreement must be linked to at least one site.

Agreement Line : Line Details - Products Under Service

Use this section to add or delete any installed products that are covered by the agreement line. The system displays the description, serial number, asset tag (if there is one), quantity, and site where the product is installed.

Use the **Add Installed Product** and **Delete Installed Selected Product** buttons to make changes to the products listed under this group box.

Agreement Line: Line Details - Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component. You can add or delete entitlements in the grid by adding and deleting rows.

The system also displays the **Holiday Schedule** field after the entitlements. It appears by default from the Service Level page. You can override it or clear it. For Platinum customers, you may want inactivate the holiday schedule by clearing the field. If you enter a holiday schedule without a service level, the system treats it as a 7 x 24 entitlement with holiday schedule.

Entitlements Apply To

The system displays a group of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that appear.

For example, if you selected the *Match Using Case Criteria* option and selected *Role, Department, Priority, Source,* and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields on this page.

If you do set values for the fields appearing in this group box, the system uses them to search for agreements when a user selects the **Select Agreement** link from the Case page.

For example, if you set the **Priority** field to *Low* on this page, the system would locate this agreement line and use the response and restore times that you set up on the agreement line for all low priority cases that meet the other criteria of the agreement line.

For all low priority cases that fulfill the other matching considerations for a valid agreement line for all low priority cases, the system uses other standard fields that are considered for an agreement match, such as start and end date, status, product, installed product, asset, and so on. The system is not using the other criteria in the Entitlements Apply To section.

Agreement Line: Line Details - Calculate Final Line Price

This section displays the variables that the CRM system used to calculate the final line price for the agreement line.

Note: This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

Field or Control	Description
Base Price	Displays the base price for the service or service product combinations of the agreement line. **Note:** For agreement lines with a prepaid purchase option, this value is informational only. The prepaid rate, not the base price, is used to calculate the final line price.
Entitlement Adjustment	Displays the sum of the uplift and discount percentage values that are associated with the entitlements on this agreement line after clicking the **Calculate Final Price** button.
Subtotal	Displays the subtotal for the agreement line after the base price has been adjusted by the entitlement uplift or discount.
Adjustment (Percentage)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter a percentage by which you want to adjust the price of the agreement line.
Adjustment (Amount)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter an amount by which you want to adjust the price of the agreement line.
Reason	Select the reason that you are making the adjustment. If the reason is not listed in the drop-down list box, click the **Other** link and enter the reason you are making the adjustment.
Final Line Price	Displays the final price for the agreement line. Sum of the Prepaid Quantity x Prepaid Rate
Calculate Final Price	Click this button to calculate the final price for the agreement line. The system retrieves all appropriate service or service/product prices, calculates subtotals and adds and subtracts any discounts or adjustments that you have made to the base price.

Agreement Line: Installed Products

The section lists all of the installed products covered by that agreement line. If the agreement covering the service order has a scope of *Site,* the installed products are limited to those that match the sites that are covered by the agreement line.

The CRM system displays the Products Under Service grid if you choose to view line details or just the installed product information of the agreement line.

It lists the customer's installed products that are eligible for the service or support specified on the agreement line. Installed product information must be added manually to the agreement.

When installed products are added to an agreement line, the CRM system automatically updates them on the agreement line whenever replacements are made at the customer's site (when material is recorded in the Service Order on the Time Material Expense page).

Before selecting an installed product, you must define a product for the agreement line; and, for agreements with a scope of *Site,* select the sites that will be covered by the line.

If the scope of the agreement is *Contact,* the installed product choices are limited to those that match the product and customer specified. You can never select installed products with a status of *Uninstalled.*

Agreement Line: Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line, including the holiday schedule. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component.

Agreement Line: Sites

The section lists all of the sites associated with the agreement line: the allowable values are determined by the sites that were entered on the Scope Details page. You can add or delete sites displayed in the grid by adding and deleting rows.

Note: This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Agreement Line: Price Information

Use this group box to enter purchase option and transactional information for the agreement line. Click the **Price Definitions** link to access the Service Pricing page.

For more information and field descriptions, refer to the Line Details - Products section for the Agreement Line Tab.

Note: This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this section either.

Related Links

Agreement - Line Defaults Page
Understanding Entitlement Searches
Agreement - Line Defaults Page
"Understanding AAF" (Automation and Configuration Tools)
"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)
"Setting Up the Order Materials Component" (PeopleSoft Integrated FieldService)

Agreement - Billing Page

Use the Agreement - Billing page (RF_AGREEMENT_BILL) to define agreement billing information.

Navigation:

Customer Contracts CRM > **Agreements** > **Agreements** > **Billing**

Note: This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement. If you selected *External - No Pricing* as the agreement category, the system does not display this page either.

This example illustrates the fields and controls on the Agreement - Billing Details page (1 of 2).

This example illustrates the fields and controls on the Billing Details page (2 of 2).

Customer Information

These fields capture information to determine how much to charge the customer for the agreement and the method of remittance that the customer uses.

Field or Control	Description
Bill to Customer	Select the customer that should be billed for the service. The primary customer appears by default in this field.
Bill To Contact	Select the contact that should be billed for the service. The primary contact appears by default in this field.
Bill To Address	Select the bill to customer address to which the bill should be sent. The primary bill to address appears by default in this field.
Currency Code	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. The base currency of the sold to customer appears by default in this field.

Payment Information

Field or Control	Description
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 payment terms 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. The system displays the **Credit Card Information** link after you select this option.

Field or Control	*Description*
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, and card verification number.
	Note: The system deletes the card verification number after the credit card authorization process is completed.
	The system populates the name of the cardholder, email address and phone number of the bill to contact (selected on the Billing page). It also populates the bill to address as the default address for the new credit card. You can enter a new address, or click the **Edit** link to update the selected address in the corresponding Person record.
	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 card vendor.
	The Credit Card Details page is also used in the Case component to submit customers' credit card information for authorization purposes.
	See "Credit Card Information Page" (PeopleSoft Call Center Applications).
Tax Parameters	Click this link to access the Tax Parameters page. Use this page to 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; however, you can override it by choosing another value.
Schedule	Select the schedule to indicate the way in which the revenue needs to be recognized in the general ledger. The system synchronizes this information from the general ledger.

Billing Information

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system does not use the new price in the totals until a user clicks the **Recalculate Totals** button. The system then calculates the sum of all active or closed lines, including those that have changed, and provides the recalculated amount in the **Total Amount** field.

Field or Control	Description
	Click the **Expanded** button to the left of the **Line** column to view all billable amounts that were included in the price for a given fee.
+/-Add or Delete Button	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter the number by which you want to adjust the price of the agreement line.
Adjustment	Enter the number, either a percentage or an amount, by which you want to make an adjustment.
Type	Select *Percent* or *Amount.*
Reason	Select the reason for the adjustment. These values are user-definable. You define reason codes on the Reason Code page (select **Set Up CRM** > **Common Definitions** > **Codes and Autonumbering** > **Reason Codes**). Use *Agreement Billing Adjustment, Case Billing Adjustment* or *Svc Order Billing Adjustment* as the reason type when you set up your reason codes. See "Setting Up Reason Codes" (PeopleSoft Call Center Applications).
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.
Extended Price	This value is calculated when you click the **Recalculate Totals** button. The system sums the total of the price, plus or minus any adjustments.
Recalculate Totals	Click this button any time there is a change to the Billing Details grid that impacts 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.

Defining Warranties

This topic provides an overview of warranty definitions and discusses how to define warranties.

Page Used to Define Warranties

Page Name	Definition Name	Usage
Warranty Page	RF_WARRANTY	Define product warranties.

Understanding Warranty Definition

Use the Warranty component to define the duration and entitlements that are associated with a warranty. Defined warranties are associated with items on the Item Definition page.

If a product references an item in its product definition and this item is associated with a warranty, any installed product that is subsequently created for this product then contains the warranty information of its own item. You can manually update or delete the associated warranty for an individual installed product.

For items that are installed at a customer's site, you can activate the warranty on a customer's installed product by using the Installed Product component. When searching for entitlements for a product on a case or service order, the CRM system checks the response time, so a warranty match may appear before or after an agreement on the results page.

Related Links

"Understanding Item Definition in PeopleSoft CRM" (PeopleSoft Product and Item Management)
Understanding Entitlement Searches

Warranty Page

Use the Warranty page (RF_WARRANTY) to define product warranties.

Navigation:

Customer Contracts CRM > **Agreements** > **Warranties** > **Warranty**

This example illustrates the fields and controls on the Warranty page (1 of 2).

This example illustrates the fields and controls on the Warranty page (2 of 2).

Warranty Details

Field or Control	Description
Provider	Select the organization that absorbs the cost of the services that are covered by the warranty. Options include: *Manufacturer, Retailer,* or *Service Organization.*

Critical Times

This section details the periods of coverage for the warranty. If an installed product is under warranty, its default start date is determined by the ship date, installation date, or order date of the installed product, as applicable. The CRM system calculates the end date by adding the warranty length to the start date.

Field or Control	Description
Warranty Length	Enter a number value to represent the length of the warranty.
Unit	Select the time unit of measure for the warranty period. The values are: *Day, Month, Week,* or *Year.*

Field or Control	Description
Starts	Select when warranty coverage begins.
	Install: Coverage begins the date when the item is installed at the customer site.
	Order: Coverage begins the date when the item is ordered.
	Ship: Coverage begins the date when the item is shipped to the customer.
Days for Refund, Days to Return, and **Days For Replacement**	Enter the number of days from the date in the **Starts** field during which the customer is entitled to return the item for a full refund, return the item to receive credit for the price of the item, or return the item in exchange for a replacement item.

Use the check boxes in the center of the page to indicate, for informational purposes, how warranty services are provided.

Field or Control	Description
RMA Required (return material authorization required)	Select if installed products under warranty must be returned for warranty services by using RMA processing.
Walk-in Allowed	Select if the customer can bring installed products under warranty to your repair center.
Warranty Transferable	Select to keep the warranty in effect for the new owner if ownership of the installed product changes.
On-Site Repair	Select if installed products under warranty can be serviced at the customer's site.
Invoice Required	Select if the customer must provide a copy of the invoice for an installed product under warranty before warranty services can be performed.
Shipment Allowed	Select if the customer can ship installed products under warranty to your repair center.
Loaner Provided	Select if the customer will be loaned a similar item while the installed product under warranty is being repaired.

Field or Control	Description
Entitlement Plan Name	Select a default entitlement plan from the **Entitlement Plan Name** field to initially populate the grid with a predefined set of entitlements.

Entitlements

Use this section to add or delete entitlements from this set as necessary. Entitlement plans are established on the Entitlement Plan Setup page. You can also manually enter all entitlement entries into the Entitlements grid without entering an entitlement plan name to pre-populate the grid.

If you do not provide warranty service on holidays, select the holiday schedule that applies to your company's hours of operation. The system uses this information to calculate start and end dates for service.

Warning! If you change the entitlements that are offered by an existing warranty, you also change the entitlements for any installed product that is covered by the warranty. When a warranty has been associated with an installed product, you should not modify the warranty definition on the Warranty page. Instead, define a new warranty with the required entitlements and update the warranty information on the Item Definition page.
The CRM system displays the information that is associated with set of entitlements as defined on the Entitlements page.

Related Links

Understanding Holiday Schedules
Understanding Agreements and Warranties
Defining Entitlements
Defining Entitlement Plans
"Managing Materials" (PeopleSoft Integrated FieldService)

Generating Sales Leads for Agreement Renewal

This topic provides an overview of lead generation for agreement renewal and discusses how to set it up

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Note: This feature is only available to customers that have licensed PeopleSoft Sales and PeopleSoft Integrated FieldService.

Pages Used to Set Up Lead Generation for Agreement Renewal

Page Name	Definition Name	Usage
General Options Page	RB_INSTALLATION	Define how many days before or after an agreement expiration date that a sales lead should be generated.
Sales Lead Generation for Agreement Renewal Page	RUN_CNTL_RFLEAD	Start a batch process that runs on a daily basis (recommended) to generate sales leads for agreements that are about to expire or have recently expired.
Lead - Discover Page	RSF_LEAD_ENTRY	Access sales leads that are generated for agreements.

Understanding Lead Generation for Agreement Renewal

To help you sustain company revenue and be proactive about contract renewals for the established customer base, set up PeopleSoft CRM to retrieve agreements that are expired or about to expire and generate sales leads for them. Like other leads, the leads that are created for agreement renewal appear on the Search Leads page for the sales team with *Agreement* as the lead source.

Lead Generation for Expiring and Expired Agreements

PeopleSoft CRM uses an Application Engine (AE) program, which runs on a daily basis (recommended setting) to look for agreements that are about to expire or have recently expired (based on the number of lead days that are defined by the user) and create leads for them.

When the AE program runs, it searches for agreements that are associated with the sales business unit that is specified on the run control page. Because sales leads are keyed by business unit and agreements are keyed by setID, the CRM system performs a business unit-setID mapping exercise in the background to determine which setID corresponds to the selected sales business unit. All agreements in that setID are processed, and all leads that are subsequently created will belong to the specified sales business unit.

Note: Only agreements with the status of *Available* are selected by the AE program for evaluation. The AE program does not process agreement templates.

Among all available agreements in the given setID, the AE program generates sales leads for those whose expiration date falls between the start and end dates of a time period that is calculated by using the user-defined lead time. The start and end dates are calculated using this formula:

(Start Date) = (Current Date) - (Agreement Renewal Lead Time)
(End Date) = (Current Date) + (Agreement Renewal Lead Time)

For example, the AE program is scheduled to run today on October 15, and the lead time (in number of days) that is defined at the installation level is 7. For any agreement with an expiration date between October 8 through October 22, a sales lead is generated by the lead generation process.

When you look up a sales lead for agreement renewal from the Search Leads page, agreement-specific information, such as agreement code and renewal number, is available on the Source tab as a reference. You can also transfer to the read-only version of the agreement from the lead.

For agreement renewal purposes, an agreement can only be associated with one sales lead at a time. The agreement is not selected by the AE program if a sales lead was already generated for it. In addition, the CRM system does not generate sales leads for agreements that are already renewed.

Setting Up Lead Generation for Agreement Renewal

This topic discusses how to:

- Define lead time for generating leads.

- Generate leads for expiring agreements.

- Access leads that are generated for agreements.

General Options Page

Use the General Options page (RB_INSTALLATION) to define how many days before or after an agreement expiration date that a sales lead should be generated.

Navigation:

Set Up CRM > Install > Installation Options > General Options

This example illustrates the fields and controls on the General Options page: General Options section.

In the **Agreement Renewal Lead Time** field, enter the number of days before expiration that an agreement is eligible for the lead generation process. This is also the number of days after expiration that the agreement is still eligible for the process. By default, this value is set to *90* days.

See Understanding PeopleSoft CRM General Options.

Sales Lead Generation for Agreement Renewal Page

Use the Sales Lead Generation for Agreement Renewal page (RUN_CNTL_RFLEAD) to start a batch process that runs on a daily basis (recommended) to generate sales leads for agreements that are about to expire or have recently expired.

Navigation:

Customer Contracts CRM > **Agreements** > **Lead Generation** > **Sales Lead Generation for Agreement Renewal**

This example illustrates the fields and controls on the Sales Lead Generation for Agreement Renewal page.

Select a sales business unit for which leads will be created for expiring agreements after the AE program (RF_AGR_LEAD) is run.

Note: The AE process should be run on a daily basis.

Lead - Discover Page

Use the Lead - Discover page (RSF_LEAD_ENTRY) to access sales leads that are generated for agreements.

Navigation:

Sales > **Search Leads** > **Discover**

This example illustrates the fields and controls on the Lead - Discover page (1 of 2).

This example illustrates the fields and controls on the Lead - Discover page (2 of 2).

Open a sales lead that is generated for agreement renewal purposes. You can click the **Agreement** link to access the agreement that needs to be renewed. The name of the agreement is listed is part of the lead name.

Related Links

"Creating a Sales Lead" (PeopleSoft Sales)
"Creating a Sales Opportunity" (PeopleSoft Sales)

Chapter 27

Defining Pricing Information for Services and Support Offerings

Establishing Pricing Records

This topic provides an overview on pricing records and discusses how to establish pricing records.

Page Used to Establish Pricing Records

Page Name	Definition Name	Usage
Service Pricing Page	RF_SVC_PRICE	Establish pricing records for service and support offerings.

Understanding Pricing Records

This topic discusses:

- Pricing records.

- Types of pricing records.

- Products, services, and service activities on pricing records.

- Pricing records for each currency.

- Purchase options.

- Pricing structures on agreements.

Pricing Records

You use the Pricing Information component in PeopleSoft CRM to define pricing records for service and support offerings. The system uses the pricing structure that you define to calculate prices on agreements.

When you are creating service orders and cases, you can use the Pricing Information component to look up the price for work not covered by an agreement, such as on-demand service or support calls, or an additional service activity that is not included in the service on the customer's agreement. The system, however, automatically populates the price defined on the Pricing page for the transaction.

Note: With the pricing records that you define in the Pricing Information component, PeopleSoft CRM can calculate agreement prices. It can also price on-demand transactions for cases and service orders as well as service fees.

Types of Pricing Records

You can define pricing records for these types of transactions:

- Agreements

- Agreement services

- Agreement cases

- On-demand services

- On demand cases

Agreement pricing records define the fee that the customer pays for an agreement that covers a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. In addition, PeopleSoft CRM supports the ability to pay for the agreement on a recurring basis.

Agreement service or case pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed.

On-demand pricing records define the amount that a customer pays for services or support offerings that are not covered by an agreement. Typically, on-demand prices are higher than agreement services prices. By purchasing an agreement, the customer may receive a discount on the normal price of a service or support offering.

Products, Services, and Service Activities on Pricing Records

The prices that you define for agreements, agreement services, agreement cases, on demand case and on-demand service pricing records can define rates for a service, a product, or both a service and a product. Pricing records that only specify products are used by call centers to define rates for supporting specific products and are identified as an agreement case or an on-demand case. Field service organizations define pricing records for a service or for a combination of a service and a product and are identified as agreement service or on-demand service.

When calculating pricing on an agreement, the system checks first for a price for the service-product combination. If none is defined, the system uses the price that is defined for the service alone. For support-based agreements, the agreement price is based on prices defined for products only.

You can also define rates for service activities and combinations of products and service activities. These pricing records enable you to adjust a customer's invoice when he or she requests additional service activities that are not included in the service.

For example, at the time that a customer requests a service that is covered by an agreement, you might want to offer the ability to upgrade the service by adding additional service activities to the basic service that is covered by the agreement. You can define a fee for each service activity that the customer adds to the basic service. Note that you can define a pricing record for a service or a service activity, but not both.

Pricing Records for Each Currency

Every pricing record defines a rate in a specific currency. You must define a complete set of pricing records for each currency that is valid for agreement, agreement service, agreement case, on demand case and on-demand service transactions in your business. When you create an agreement, you can reference the pricing records for only one currency.

Purchase Options

You can define prices for these types of purchase options:

*   Flat

*   Prepaid

*   Time and material

A flat purchase option specifies a set price for a service or support offering on an agreement, an agreement service, or an on-demand service pricing record. A flat rate for an agreement is expressed in a time-based unit of measure, such as hours, days, weeks, months, or years.

For an agreement service, on-demand service, agreement case, or on-demand case, flat rates are expressed in units of work, such as per case or per service order. The flat rate is expressed as an amount to be paid for each installed product that is covered by that service. For example, if a flat rate is defined as 100 USD per year for a service, and the agreement line that references that service has two installed products, the line price would be calculated as 200 USD for one year.

With the prepaid purchase option, customers pay for a specified quantity of a service or support offering at the time that they purchase the agreement. The prepaid purchase option applies only to agreement pricing records. You define a price for a set quantity of cases or service orders, or a price for a certain number of hours worth of work.

You may define different prices for the same service or service-product combination for different prepaid quantities; for example, 100 USD per service order when prepaying 20 service orders, and 90 USD per service order when prepaying 50 service orders. The prepaid quantity of cases or service orders is saved on the agreement, and the value is decreased when a case or service order is created to account for the consumption.

If the case or service order is subsequently canceled, the quantity is added back to the agreement. If the prepaid quantity is in units of hours, the system decreases this quantity each time a technician or agent reports time that is spent (total hours) on a service order or case that is covered by the agreement line.

The time and material purchase option defines a rate for the labor time that is required to perform the requested work. This rate is always expressed as a time-based unit of measure and applies only to agreement and on-demand service and case pricing records. Material is not directly accounted for by the time and material purchase option. However, you can track material usage for service orders and manually account for the material when creating the customer's invoice.

This table summarizes the valid data combinations on a pricing record and provides an example for each combination:

Applies To	Purchase Option	Unit	Prepaid Quantity	Example
Agreement	Flat	Time-based (hour, day, week, month, year).	Not allowed	200 USD per year.
Agreement	Prepaid	Case, service order, or hour.	Required	30 USD per service order for a prepaid quantity of 15.

Applies To	Purchase Option	Unit	Prepaid Quantity	Example
Agreement service/case	Time and material	Time-based (hour, day, week, month, year).	Not allowed	40 USD per hour.
Agreement service/case	Flat	Case or service order.	Not allowed	45 USD per service order/case.
On-demand service/case	Flat	Case or Service order.	Not allowed	55 USD per service order/case.
On-demand service/case	Time and material	Time-based (hour, day, week, month, year). For cases it's only hour.	Not allowed	75 USD per hour.

Pricing Structures on Agreements

On agreements, you can set up pricing structures that use various combinations of pricing records.

For example, your business might offer a five-year preventive maintenance (PM) service agreement for air conditioners. For an agreement price of 500 USD, a service technician will perform preventive maintenance tasks on a customer's air conditioner for five years.

For customers who buy this agreement, you also offer repair services for 75 USD per service call—a 50 percent discount off your on-demand rate. To support this agreement scenario, you define an agreement pricing record with a flat purchase option for preventive maintenance service of 100 USD per year. You also define an agreement service pricing record for your air conditioner repair service for a flat rate of 75 USD per service order. Your on-demand pricing record for the same service would be 150 USD.

After defining your pricing records, you create an agreement with a five-year duration that references the agreement and the agreement service pricing records. The customer who buys the agreement pays 500 USD and receives preventive maintenance service for five years. If the customer's air conditioner requires repair services, the customer pays 75 USD per repair service order for the duration of the five-year agreement.

Note: Prepaid quantity is a fixed amount per contract, not per year. In this case, if someone were to prepay for 10 PM visits (regardless of agreement duration), you can define a prepaid price of 50 USD per service order for a quantity of 10 service orders. An alternate arrangement would be to define a flat rate of 100 USD per year for unlimited PM service. For a five-year agreement, this would cost 500 USD for unlimited PM service.

Related Links
Understanding Agreements and Warranties

Service Pricing Page

To establish pricing records, use the Service Pricing (RF_SVC_PRICE) component.

Use the Service Pricing page (RF_SVC_PRICE) to establish pricing records for service and support offerings.

Navigation:

Pricing Configuration > **Service Pricing** > **Service Pricing**

This example illustrates the fields and controls on the Service Pricing page.

Note: To establish pricing for products that you sell, use the Price page under Products CRM. Also, material costs for items are stored in the inventory system.

Search Filter

Select pricing information that meets a specific set of criteria. Enter the criteria and click the **Search** button. If you click the **Search** button without specifying any criteria, the system returns all pricing records that are defined for the setID.

Field or Control	Description
Service	Select a service to limit the search to pricing records that are defined for a specific service. You define services by using the Services component. Click the **Transfer to Service** button to access the Services component. Services are not relevant to pricing for support agreements.
Activity	Select a value to limit the search to pricing information that is defined for a specific service activity. You use the Service Activity Code page to define activities. Click the **Transfer to Activity** button to access the Service Activity Code page. **Note:** Search criteria can include a service or an activity, but not both. These fields are mutually exclusive on the pricing record.

Field or Control	Description
Purchase Option	Select a value to limit the search to pricing records for the specific purchase option:*Flat, Prepaid,* or *T&M* (time and material).
Product ID	Select a value to limit the search to pricing records for specific product. You establish products in PeopleSoft CRM by using the Product EIP or the Product Definition component.
Applies To	Select a value to limit the search to pricing records for the specific applies to option: *Agreement, Agreement Case, Agreement Service, On Demand Case,* or *On Demand Service.*
Currency Code	Select a value to limit the search to pricing records for a specific currency. You establish currencies on the Currency Code page.

Prices

The system displays the pricing information records that meet the search criteria.

Applies to Information

Field or Control	Description
Applies To	Select the transaction that the pricing record applies to: *Agreement, Agreement Case, Agreement Service, On Demand Case,* or *On Demand Service.*
Purchase Option	Select the purchase method for the service or support offering: *Flat, Prepaid,* or *T&M* (time and material). The *Prepaid* option applies only to pricing records for agreement transactions. The *T&M* option applies only to pricing records for agreement service, agreement case, on demand case and on demand service transactions.
Service	Select the service that the pricing applies to, if applicable. You use the Services component to define services. Click the **Transfer to Service** button to access the Services component. Services are not relevant to pricing for support agreements.

Field or Control	Description
Product ID	Select the product that the pricing record applies to, if applicable. Click the **Transfer to Product** button to access the Products component. If you specify both a product and a service on a pricing record, the price applies only to that particular service-product combination. Pricing records that only specify products are used only by call centers to define rates for supporting specific products.
Activity Code	Select the service activity that the purchase option applies to. You can define pricing records for service activities or combinations of service activities and products. You can define a pricing record for a service or an activity, but not both. You can use service activity price information to adjust a customer's invoice when activities are added to a service that is covered by an agreement. The system displays the information on the Billing page for the service order or case.

Rate Information

Field or Control	Description
Currency Code	Select the currency of the rate amount. You must define a complete set of pricing records for service and support offerings for each currency that you use.
Rate Amount	Enter the amount that is charged per the specified unit in the specified currency.
Unit	Select the unit of work that is associated with the rate amount. Depending on your **Applies To** and **Purchase Option** field selections, you can specify a rate for the following work units: *Day, Hour, Month, S.O.* (service order), *Case, Week,* or *Year.*
Prepaid Quantity	Enter the number of work units of a service or support offering that a customer pays for in advance. This value applies only to the *Prepaid* purchase option.

See *PeopleSoft FSCM: Inventory* product documentation.

Related Links

Understanding Pricing Records

"Understanding Products in PeopleSoft CRM" (PeopleSoft Product and Item Management)

Understanding Agreements and Warranties

"Understanding the Service Data Model" (PeopleSoft Integrated FieldService)

Chapter 28

Performing Entitlement Searches for Cases and Service Orders

Understanding Entitlement Searches

This topic discusses:

- Entitlement searches.

- Minimum information that is required to perform entitlement searches.

- Warranty matches.

- Agreement matches.

- Service level suspensions for PeopleSoft HelpDesk.

- Delay Notifications.

- Workflow.

Entitlement Searches

Entitlements define what a customer is contractually owed for the service or support offering on an agreement line or warranty. When you perform an entitlement search on the Service Order page or Case page, the system searches for valid agreement lines or warranties that cover the work on the service order or case and displays the associated entitlements.

The system uses the values that you entered in the fields for product ID, serial number, service, and either site or site identification number (SIN) to search for agreement line and warranty matches for service orders. For cases, the system uses the same fields (with the exception of service) as well as those for contact or personal identification number (PIN).

For support cases, the system passes customer, contact, product ID, serial number, case ID, PIN, SIN, and site as the search criteria for entitlement searches.

For help desk cases, the system passes employee, case ID, product, asset tag, priority, source, department, location, employee role (defined as manager level in the Worker component), and person type (employee, contingent worker, or person of interest) to the search. Additionally, for employees and contingent workers, the employee status is passed to the search.

Note: If the internal agreement search option is set to *Match Using Case Criteria,* the system additionally passes priority, source, department, location and employee role information to PeopleSoft HelpDesk searches, depending on the values that are set on the Agreement Search Configuration page. Likewise, if the external case agreement search option is set to *Match Using Case Criteria,* the system additionally passes case category, priority, source, type, and customer value information to PeopleSoft Support entitlement searches, depending on the values that are set on the Agreement Search Configuration page.

If the system renders more than one warranty or agreement line that match the available search criteria, you can select the appropriate one from the entitlement match list that is generated by the system. When you make a selection, or if the CRM system finds only one match, the entitlement information of the selected agreement line or warranty is automatically populated to the service order or case. You can view the entitlement details directly on the service order or case.

Minimum Information That Is Required to Perform Entitlement Searches

Before you perform an entitlement search, you must provide a customer or employee that is associated with a case or service order. Additionally, the case search uses the case ID plus one of the following: contact, PIN, site, or SIN. The product ID and serial number or asset tag number are optional but are recommended because they focus the search to a much greater degree.

For entitlement searches on service orders, you need to provide a site ID or SIN in addition to the customer. You can further limit the search by entering a product ID (or the installed product ID, which is identified by the serial ID on the service order), or a service.

When entering information on the case or service order, the system uses the product ID that you enter to select the appropriate installed product records for the customer. If you do not enter enough information to uniquely identify an installed product, all the matching entitlements are returned.

Warranty Matches

If you enter an installed product on the service order or support case, the system checks for a valid warranty that applies to the installed product. The system identifies the installed product by using the serial number that appears on the case or service order.

When an installed product is specified on the service order or support case, the system checks for the following conditions:

- The installed product is associated with a warranty.

- The current date is equal to or later than the warranty start date.

- The current date is equal to or prior to the warranty end date.

- The status of the warranty is *Active.*

If all conditions are met, the system returns the warranty as a match. The system does not return, and you cannot select, warranties from searches for a PeopleSoft HelpDesk case.

Agreement Matches

The CRM system searches for agreement line matches in addition to any warranty matches that are found. For an agreement line to be considered for the entitlement search, the current date must fall on or between the start and end dates on the agreement line, the agreement line must have a status of *Active,* and the agreement itself must have a status of *Active.*

The customer who is listed on the service order or support case must match the customer who is identified on the agreement.

The internal PeopleSoft HelpDesk agreement always applies to all employees, except when the user has selected *Match Using Case Criteria* on the Agreement Search Configuration page for internal agreements and has applied the various rules to individual agreement lines to limit the applicability of those lines to certain groups of employees based on role or department. The administrative contact on the header page for the internal agreement is NOT the worker for whom the agreement applies.

If a SIN is entered, the CRM system returns all agreement lines whose site matches the site linked to that SIN on agreements with a scope of *Site.* If a site ID but not a SIN is provided, the system returns all agreement lines that match the site ID.

Note: On a case in which a site ID was previously selected, the CRM system limits the selection of installed products to those that are specified for that site. On a service order in which a site ID was previously selected, the system limits the selection of products and installed products to those that are available to the selected site only.

If you enter a PIN, the system returns all agreement lines whose contact (named caller) matches the PIN on agreements with a scope of *Contact.* If a contact but not a PIN is provided, the system returns all agreement lines where the contact is listed as the named caller.

Note that field service agreements only use authentication by site or SIN (not by named callers). Therefore, no **PIN** field exists on the service order, and the contact's person ID is not matched against PIN entries in agreements.

If an installed product is identified on the case or service order, the system returns all agreement lines that list the installed product as a product under service. Agreement lines that cover the corresponding product ID and do not list individual installed products (for example, agreement lines that provide blanket coverage) are also returned.

Note: The Agreement Search Configuration page enables you to choose the rules on how you want the system to return lines for agreement searches. For PeopleSoft Support, Integrated FieldService, and HelpDesk you can enable the system to search for agreements based on the shortest or longest response times; or let the user select from all matches. Additionally, for PeopleSoft HelpDesk and Support, you can set up specific rules by which the system will search for agreements by matching on additional criteria.

Service Level Suspensions for PeopleSoft HelpDesk

When a service level agreement (SLA) cannot be met for justifiable reasons, an agent using PeopleSoft HelpDesk can change a case to the *On Hold* status. In this situation the system sends a suspension notification to the agent's manager. This also applies to PeopleSoft Support.

The system stops the clock for the service agreement and clears the response and restore dates and times. When the case is activated again, the agent or manager changes the case status back to *Open.* When this happens the clock resumes from where it left off and the response and restore dates and times are recalculated to reflect the on hold period.

To facilitate these processes, PeopleSoft delivers these notifications and workflow exceptions:

Delay Notifications

When the agreement is applied, the system sends out a delayed notification to remind the agent, provider group, or call center manager of a potential SLA delay. PeopleSoft delivers these notifications as sample data:

*   Response

    *   Based on delayed percentage configured through AAF, the system sends a notification to the agent regarding initial response if it's not met yet. If no agent is assigned to the case, the system sends notification to the provider group. If no provider group is defined on case either, the system send notification to the call center manager.

    *   When the delay reaches 100 percent of the response time, the system sends a notification to the agent and manager regarding the response exception and sets the service agreement response met flag to *No.*

*   Restore

    *   Based on delayed percentage configured through AAF, the system sends a notification to the agent warning of potential service agreement exceptions (the same change as response.)

    *   When the delay reaches 100 percent of the restore time, the system sends a notification to the agent and manager regarding the restore exception and sets the service agreement restore met flag to *No.*

Workflow

This is general workflow delivered for SLA, not workflow exceptions. The CRM system delivers these workflows as system data:

*   SLA Start

    When a case is associated with a service agreement or warranty, the system triggers an SLA start event to create an event history entry with an agreement code or warranty name.

*   Delayed Notification

    When service starts, the system schedules delayed notifications. The system sends an initial notification to the agent, provider group, or call center manager regarding call back or warning of potential exceptions. When you first install your CRM application, PeopleSoft delivers 90% delayed notification. The system sends out a notification when the case is not responded to and is past 90% of the customer's entitled response. You can, however, percentage easily configure this percentage in AAF.

*   SLA Response Met

    When a case is responded to within the entitled response time, the system triggers an SLA Response Met event and creates an event history record.

*   SLA Restore Met

    When a case is closed within the entitled restore time, the system triggers an SLA Restore Met event and creates an event history record.

- SLA Response Exception (Application Engine process)

  This workflow exception is scheduled as a delayed Application Engine process when service starts. When the service response is not met, the system wakes up the Application Engine program. The program calls the component interface (CI) to set the response met flag to *No,* and then triggers the SLA Response Exception workflow.

- SLA Response Exception (workflow)

  When the response met flag is set to *No,* the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Restore Exception (Application Engine process)

  This workflow exception is scheduled as a delayed Application Engine process when service starts. When a case is still open at the time restore is reached, the system wakes up the Application Engine program. The program calls the CI to set the restore met flag to *No,* and then triggers the SLA Restore Exception workflow.

- SLA Restore Exception (workflow)

  When the restore met flag is set to *No,* the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Change

  Users with the change privilege can open the case, clear the service agreement, change the search criteria (changing priority or source is mainly for PeopleSoft HelpDesk users). For PeopleSoft Support and helpdesk, users with privilege can clear the SLA, change other items, and reattach the SLA. Additionally, they can attach another service agreement based on the new criteria. This workflow event triggers the SLA Change workflow to create an event history entry indicating a new service agreement code. As such, a new service agreement cycle starts. The system also cancels any outstanding service agreement exception workflows and triggers the rescheduling of the service exception. The user can detach the SLA in the SLA section for a case. PeopleSoft delivers sample data so that only call center managers and help desk managers can detach an SLA.

- SLA Suspension

  When an agent changes a case status to *On Hold,* the system triggers an SLA Suspension event. The system sends a notification to the manager. It also cancels any outstanding delayed notifications and service exception workflows.

- SLA Resume

  When a manager declines the service agreement suspension or the case is ready to be worked on again, the manager or agent changes the case status from *On Hold* to an *Open* status. The system triggers an SLA Resume event to reschedule service exception workflows.

When a case is not assigned to any agent, a notification is sent to the provider group on the case. If there is no provider group, a default provider group on the Business Unit Setup page is used for notification.

Related Links
Configuring the CRM System for Agreement Searches
Understanding Agreements and Warranties

"Understanding the Configurable Case" (PeopleSoft Call Center Applications)

"Understanding Service Orders" (PeopleSoft Integrated FieldService)

Performing Entitlement Searches

This topic discusses how to search for and view agreements and warranties.

Pages Used to Perform Entitlement Searches

Page Name	Definition Name	Usage
Entitlement Match Page	RF_ENTL_LIST_SEC	View and then select the entitlements defined on the agreement line or warranty that cover the service on a service order or the support offering on a case. This page appears only if multiple agreement lines or warranties meet the entitlement search criteria.

Entitlement Match Page

Use the Entitlement Match page (RF_ENTL_LIST_SEC) to view and then select the entitlements defined on the agreement line or warranty that cover the service on a service order or the support offering on a case.

This page appears only if multiple agreement lines or warranties meet the entitlement search criteria.

Navigation:

• From the Case or Service Order page, click the **Select Agreement or Warranty** link.

• For PeopleSoft HelpDesk cases, select the **Select Agreement** link from the Case page.

This example illustrates the fields and controls on the Entitlement Match page.

The system displays agreements and warranties that meet the entitlement search criteria that is entered for the service order or case. Select the appropriate agreement line or warranty for the case or service order. The system displays the details for the agreement line or warranty in the **Details** group box. You can only select one agreement line or warranty.

Note: If you have not saved the service order, you can perform another entitlement search and select a different warranty or agreement line by clicking the **Edit** button on the Service Order page.
For cases, agents can attach an agreement, but only the manager can detach it once it saved. When an agent selects an agreement on a case, he or she can still perform another search by clicking the **Clear** link and selecting a different agreement before saving the case.
Once the case is saved, only the manager has the privilege to change the agreement. This is controlled through the rule-based security that is defined in the Display Template Component pages for the **Clear** field. PeopleSoft delivers help desk manager and call center manager as sample data and provides these user IDs with the ability to detach agreements.

See "Understanding Display Templates" (Automation and Configuration Tools).

Select One Line for Entitlements

Field or Control	Description
Name and **Type**	Displays the name (agreement or warranty) of the entitlement match. Click the adjacent **Agreement or Warranty Transfer** button to access the corresponding Agreement or Warranty component.
Renewal Number	Displays the renewal number for the agreement. There are no renewals for warranties.
Line	Displays the agreement line number that specifies entitlements for the combination of relevant criteria that has been entered on the case or service order. **Note:** As described earlier in this topic, the criteria used for identifying agreement lines may include more than just the customer, site, and product ID.
Description	Describes the agreement or warranty as it was entered into the system.
Service	Describes the service that is associated with the agreement or warranty. Click the **Transfer to Service** button to access the Service page and view details of the service as it was entered into the system. The system displays this field for PeopleSoft Integrated FieldService only.

Entitlement Details

Lists the entitlements that define the response time, restore time, service level, or coverage that are contractually owed to the customer as defined by the agreement line or the warranty.

Product Information

Field or Control	Description
Product ID and **Product Description**	Displays the ID and description of the product
Currency	Displays the currency of the transaction price. The system does not display this field for PeopleSoft HelpDesk.

Field or Control	Description
Transaction Price	Displays the price of the transaction for receiving support or the specified service for the product (repair, preventive maintenance, and so on). The system does not display this field for PeopleSoft HelpDesk.
Purchase Option	Displays the method of purchasing the service or support offering for an agreement or agreement service transaction. The system does not display this field for PeopleSoft HelpDesk. Options are: *Flat:* The service or support offering is purchased for a flat fee. *Prepaid:* A specified number of work units of the service or support offering is purchased in advance. There is no transaction fee for the service or support offering as long as there is remaining quantity for the agreement line. *T&M* (time and material): The price of the service or support offering per transaction is based on the labor rate.
Remaining Quantity	Displays the amount of unused, prepaid quantity. As long as a positive quantity remains, there is no transaction fee for the service order or support offering. For field service agreements, the prepaid quantity is in units of service orders or hours, and the system decreases this quantity by 1 service order or the appropriate number of hours specified in the timelog as billable each time a service order that is covered by the agreement line is saved. If the service order is canceled, the system increases the appropriate number of hours or remaining quantity by 1. For support agreements, workflow processes must be implemented to update remaining quantity. Lines with zero remaining prepaid quantities are not shown. --- **Note:** The system makes any agreement line available for selection that has more than one product for which there are some products with a zero prepaid balance and some products that have a positive prepaid balance or do not use the prepaid purchase option. If the user selects that line, the system makes the corresponding detail section with the product lines that have zero prepaid balances unavailable for selection. ---

Related Links

Understanding Entitlement Searches
Understanding Agreements and Warranties

Chapter 29

Managing PeopleSoft Customer Relationship Management Integration Points

Understanding the Interactive Services Repository

The Interactive Services Repository (ISR) is a compilation of information about the numerous service endpoints exposed by Oracle's PeopleSoft and JD Edwards product families. Integration Points, also known as EIPs or XPBs, are the web service connections that enable PeopleSoft and JD Edwards applications to work smoothly with third-party systems and software, as well as other Oracle applications.

ISR works in conjunction with PeopleSoft product documentation to help users and implementation specialists fully explore the integration capabilities of our products.

Developers use ISR to document the technical structure of an integration point, its design patterns, and underlying technology. Analysts will use ISR to explore and understand integration points from a business process context. This is especially useful when implementing an Oracle-supported reference business process across multiple products and release versions.

Key Search Features of ISR

ISR contains high-level information about each integration point, including:

• Brief description.

• Product family.

• Product owner.

• Business Process association.

• Data rules.

• Setup rules.

ISR enables you to quickly discover the integration points that are relevant to your specific needs. You can search for integration points by name, integration set, product, between products, business process, and technology type. Use My Oracle Support to access ISR.

See Introduction to the PeopleSoft Interactive Services Repository (ISR)) [ID 735571.1].

Understanding PeopleSoft CRM Integration Points

PeopleSoft CRM integration points enable you to:

- Send or publish service operations to a third-party system.

- Accept or subscribe to service operations from third-party systems.

- Send a synchronous request and reply transaction to a third-party system for processing.

Processing PeopleSoft Business Interlinks Transactions

Sometimes PeopleSoft CRM needs to call an external system vendor's application to request information. This information must be provided in a realtime, synchronous mode. The PeopleSoft application waits for the answer from the other application in realtime, before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlinks definitions to specify the data passed to this external system as well as to define the output to be received from the external system. The data that is passed from the interlink object is interpreted by an interlink plug-in, which then contacts the external system, passes the data in the correct form, retrieves the data, and then passes it, in the correct form, back to the interlink object.

Note: Business Interlink are just one of the ways you can process realtime transactions. There are many different ways you can capture this kind of information. Please refer to the ISR on My Oracle Support for more information.

See:.

- *PeopleTools: PeopleCode API Reference* product documentation

- Introduction to the PeopleSoft Interactive Services Repository (ISR) [ID 735571.1]

Processing Inbound Service Operations

Third-party systems can send PeopleSoft applications information using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

Understanding the Inbound Transaction Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system:

Application Message Based Transaction

The PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. XML messages are automatically loaded into the PeopleSoft system by setting the queue status to run for each message type. You can view all transactions in the transaction log and access the detail pages that enable you to correct transaction errors. Most subscription processes get associated to handlers. Handlers are then defined on a service operation.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based application messages.

Electronic Data Collection Transaction Pages

PeopleSoft CRM includes transaction pages for many of the inbound transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

System-Generated Transactions

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

Validations, Error Handling, and Database Updates

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables, where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction status in the transaction log is changed to *Error,* and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts (select **PeopleTools** > **EDI Manager** > **View EDI Audit Trail** > **Transaction Maintenance**).

For definitional type data such as item primary and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected the information and saved the page, the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

See *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Service Operations Monitor* product documentation.

Processing Outbound Service Operations

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. The PeopleSoft Application Messaging technology is utilized to format and publish industry standard XML messages. For example, as item primary information is entered into PeopleSoft applications, the system generates XML-based messages and delivers them to third-party systems requiring this information to set up their own item primary tables.

Understanding the Outbound Transaction Architecture

PeopleSoft CRM applications as well as interacting third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound application messages.

For example, a third-party system requiring item primary information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online or may want periodic updates on a nightly or weekly basis. The Item Primary EIP provides both options, giving the third-party system the choice as to how it wants to receive this information.

Component or Incremental Publish

The system generates Component Published messages immediately upon saving a component in various PeopleSoft applications. Components used to maintain setup type information such as items or customers utilize the Component Publish approach.

Batch Publish

Batch Publish messages provide the functionality to group many like transactions into a single message.

Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of like transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This message may go directly to the customer or it may go through third-party software that converts the XML message to one of the industry standard EDI formats, such as X.12, before passing it on to the customer. Using the options available with the Batch Publish approach, users can dictate whether to create a single message for all customers to send to the third-party software or create individual messages to send directly to each customer.

PeopleSoft CRM applications all use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or "chunk" messages as noted in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML messages, when file layout objects exist for transactions being generated. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the EDI feature.

Full Data Replication

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables—that is, relatively static, low volume tables keyed by setID.

Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the primary. Incremental updates occur most often with transaction tables—that is, frequently updated tables keyed by business unit.

Most full data replication message names end in _FULLSYNC.

Chapter 30

Setting Up Common Industry Functionality

Understanding Industry-Specific Setup

Industry-specific setup consists of three setup steps:

- Core functionality required for the industry.

- Requirements common to all industry-specific installations.

This topic discusses the setup requirements for industry-specific functionality. The setup requirements for core functionality are discussed in the appropriate topics.

Requirements Applicable to All Industries

This sections discusses:

- Markets.

- Industry-specific page setup.

- Industry-specific translate values.

- Display templates.

Markets

PeopleSoft CRM industry applications are built on the core applications. Market is an attribute of every PeopleTools component that is used to enable the system to make components available to only certain industries. When developers add custom features to the copy of a core component that is going to be used for a specific industry, the component is marked with an industry market setting so that the system knows that both the component and the added custom features are specific to an industry application.

See Understanding PeopleSoft CRM General Options

Industry-Specific Page Setup

PeopleSoft CRM identifies a list of component pages that are used in both core and industry applications using the Industry-Specific Page Setup page. Set by market, each page setup definition includes information, such as the base page, menu name, item name, page name, record, base record, bar name, component name, page item name, and component interface name of the specified component page. The system uses this page setup data to facilitate the communication between applications.

See Industry-Specific Page Setup Page

Industry-Specific Translate Values

Using industry-specific translate pages, you can set up field values for industry use without performing any development tasks in PeopleSoft Application Designer. As you open a page after the setup, depending on the market to which this opened page belongs, the industry-specific translate values (for drop-down list boxes with declared industry-specific translate values) appear.

See Industry-Specific Translates Page

Display Templates

The introduction of display templates eliminates the need for component cloning. The idea is to make the look and feel of components entirely configurable using templates, so that they can potentially be used in any scenario. In the display template framework, only one version of a component exists. This component is a consolidation of all its variants and it consists of all the parts and pieces that can be manipulated. Each implementation that wants to present the component in its specific way creates a display template for the component. Through the display template, you can control the visibility of component pages and fields, alter section and field labels, apply field-level security and setup options that are available to the component.

See "Configuring Display Templates for Components" (Automation and Configuration Tools)

Setting Up Common Industry Functionality

This section discusses how to:

- Set up industry-specific pages.

- Set up industry-specific translate values.

Pages Used to Set Up Common Industry Functionality

Page Name	Definition Name	Usage
Industry-Specific Page Setup Page	RB_MKT_PAGE	View a list of component pages that are used in the industry applications.
Industry-Specific Translates Page	RB_MKT_XLAT	View or modify a list of translate values that are used in the industry applications.

Industry-Specific Page Setup Page

Use the Industry-Specific Page Setup page (RB_MKT_PAGE) to view a list of component pages that are used in the industry applications.

Navigation:

Set Up CRM > **Product Related** > **Industry** > **Industry-Specific Page Setup** > **Industry-Specific Page Setup**

This example illustrates the fields and controls on the Industry-Specific Page Setup page.

Set by market, each page setup definition includes information, such as the base page, menu name, item name, page name, record, base record, bar name, component name, page item name, and component interface name of the specified component page. The system uses this page setup data to facilitate the communication between applications.

Note: *Do not* modify the information delivered on the Industry-Specific Page Setup page unless you are customizing PeopleSoft CRM. Customizing requires you to update several values (such as the component interface name) on this page.

Industry-Specific Translates Page

Use the Industry-Specific Translates page (RB_MKT_XLAT) to view or modify a list of translate values that are used in the industry applications.

Navigation:

Set Up CRM > **Product Related** > **Industry** > **Industry-Specific Translates** > **Industry-Specific Translates**

This example illustrates the fields and controls on the Industry-Specific Translates page.

Using industry-specific translate pages you can set up field values for industry use.

See Understanding Business Units in PeopleSoft CRM

Chapter 31

Using the PeopleSoft Data Migration Workbench for Application Data

Understanding the PeopleSoft Data Migration Workbench

The PeopleSoft Data Migration Workbench facilitates the Configuration Management process to migrate application configuration data. Using Application Data Sets (ADS) as its underlying transport technology, the Data Migration Workbench enables you to compare, validate, and copy the content data from one database to another.

The Data Migration Workbench is an effective alternative to Data Mover scripts, providing greater visibility and control of managed changes in your environments. Any authorized developer or administrator can easily define application data sets using the PeopleSoft Pure Internet Architecture (PIA) and compare and copy the data in much the same way as the copy and compare process of managed objects.

Note: You can still use Data Mover scripts to load application data; however, Data Mover does not provide a way to compare and validate the data that is copied. Although ADS does provide basic validation, you should validate your results by running tests using test environments first before using ADS to migrate data to your production environment.

Data Migration Using Application Data Sets

The Application Data Set functionality is comprised of the following components:

- Data Set Designer

- Data Migration Workbench

Data Set Designer

Authorized administrators use the Data Set Designer to create data set definitions (ADS definitions) as a hierarchical structure of records and their collective properties.

A data set definition, with its group of records, constitutes a data set. Both record definitions and data set definitions are metadata that define the shape of the migration data. The same data set definition must exist in any PeopleSoft database that participates in a data set copy or compare.

Data Migration Workbench

Authorized administrators can then use the Data Migration Workbench to insert data set instances (data content) into projects that represent a unit of work as a data migration project. Data migration projects are like managed object projects: a collection of data set instances with various data set definitions. The Data Migration Workbench enables administrators to copy and compare projects containing data sets as well as view compare reports and validation reports.

You can also integrate the Enterprise Components Approval Framework to provide administrative control of the Project Copy from File process. Employ enhanced security to ensure that the Data Set definitions are suitable for copying data, to enable user security for the PIA data set pages, and assign access to copy and compare the data. PeopleSoft delivers the MigrateData process ID for enabling data migration Approval Framework.

Using Application Data Sets

The Application Data Set functionality includes the Data Set Designer component (PTADSMMGR) and the Data Migration Workbench component (PTADSDMW):

1. Data Set Designer - Authorized administrators use the Data Set Designer to create data set definitions (ADS definition) as a hierarchical structure of records and their collective properties. A data set definition, with its group of records, constitutes a data set. Both record definitions and data set definitions are metadata that define the shape of the migration data. The same

2. Data Migration Workbench - Authorized administrators can then use the Data Migration Workbench to insert data set instances (data content) into projects that represent a unit of work as a data migration project. Data migration projects are like managed object projects: a collection of data set instances with various data set definitions. The Data Migration Workbench enables administrators to copy and compare projects containing data sets as well as view compare reports and validation reports.

   You can also integrate the Enterprise Components Approval Framework to provide administrative control of the Project Copy from File process. Employ enhanced security to ensure that the Data Set definitions are suitable for copying data, to enable user security for the PIA data set pages, and assign access to copy and compare the data. PeopleSoft delivers the MigrateData process ID for enabling data migration Approval Framework.

Pages Used in Data Set Migration

Page Name	Definition Name	Usage
Dataset Designer - Identity	PSADSDEFNPAGE	Identify the top-level properties of the data set.
Dataset Designer - Validation	PSADSVALIDATION	Define the extension application class that will be used to validate the data in the ADS definition.
Data Migration Workbench – Project Definition	PTADSDMWPRJDEFN	Define the data migration project.
Data Migration Workbench - Data Set Content	PTADSDMWCONTENT	Define the data content for the project.

Data Migration Workbench – Project Definition Page

Use the Data Migration Workbench – Project Definition page (PTADSDMWPRJDEFN) to define the migration project.

Navigation:

PeopleTools > **Lifecycle Tools** > **Data Migration Workbench** > **Project Definition**

Data Migration Workbench - Project Definition Page

Add a project name for your migration project and select the data set name for the project content that you want to migrate. For Allocations, for example, you can select the following delivered data sets to migrate your allocation configurations from one database to another:

• ALLOCATION_STEP

• ALLOCATION_GROUP

• ALLOCATION_REQUEST

Data Migration Workbench - Data Set Content Page

Use the Data Migration Workbench – Data Set Content page (PTADSDMWCONTENT) to define the data content for the migration project.

Navigation:

PeopleTools > **Data Migration Workbench** > **Data Set Content**

Data Migration Workbench - Data Set Content Page

If you have selected more than one data set for your project, make sure you select each data set name for which to insert the content that you want to migrate.

CRM has provided the following Data Sets that can be used as is for a set of predefined CRM data.

Note: The appropriate Enterprise Components Data Sets should be already set up for the CRM Data Sets to work.
For more details, see "Understanding Application Data Sets" (Active Analytics Framework)

Data Set Definition Name	Description
AAF_ACTION_HIST	Action History
AAF_BRANCH_SCRIPT	AAF Branch Script
AAF_BUS_PROJ	DisplayAlert Action Config
AAF_CASE_ACTIONS	Case Actions
AAF_CASE_ACTION_HIST	Case Action History
AAF_CASE_ENT_BAL	Event Configuration
AAF_CASE_REL	Case Relationship Action
AAF_CASE_SUG_ACTN	Configure Suggested Action
AAF_CM_ACTION_HIST	Change Request History
AAF_COMP_WL	External Worklist Entry

Data Set Definition Name	Description
AAF_DISP_TEMPLATE	Display Templates
AAF_LEAD_ACTION	Lead Actions
AAF_POSTPRCS	Post Processes
AAF_WORKFLOW	AAF WORKFLOW

Chapter 32

Using PeopleSoft Fluid User Interface Home Pages

Understanding PeopleSoft Fluid User Interface Home Pages

This overview discusses the PeopleSoft Fluid User Interface.

The PeopleSoft Fluid User Interface

Oracle's PeopleSoft has two user interfaces:

- PeopleSoft Classic User Interface, which was designed to be used on a laptop and desktop.

  This interface was previously known as PIA (PeopleSoft Internet Architecture).

- PeopleSoft Fluid User Interface, which was designed to be used on mobile devices, but can also be used on a laptop and desktop.

  Oracle delivers fluid pages for a variety of PeopleSoft CRM self-service transactions.

Fluid mode is enabled in web profiles. When fluid mode is enabled, an additional web profile setting controls whether fluid mode is available on desktop devices as well as mobile devices. On desktop devices, fluid pages appear only if the browser supports the PeopleSoft Fluid User Interface. Users with older browsers see only classic pages even if fluid mode is enabled for desktop devices. If fluid mode is disabled, fluid pages and content references throughout the system are disabled, Users can still access the classic versions of pages that have both classic and fluid versions, but transactions that exist only as fluid components are not accessible.

For details on enabling Fluid and browser compatibility, refer the following PeopleTools documentation regarding the PeopleSoft Fluid User Interface:

- *PeopleTools: Applications User's Guide*, Working With PeopleSoft Fluid User Interface.

- *PeopleTools: Fluid User Interface Developer's Guide*

Fluid Home Pages

Home pages are collections of tiles that users tap to access transactions.

Note: Currently a home page on a smartphone will not display tiles to classic pages.

Users can have multiple home pages. The main Fluid Home provides access to all of these home pages. The Fluid Home appears when users sign into the system in fluid mode (that is, when users sign in from a mobile device or, if fluid is enabled for desktop devices, from a browser that supports fluid pages). Users can additionally access the Fluid Home by selecting Fluid Home from the classic menu.

PeopleSoft Fluid User Interface Concepts

Getting Started with PeopleSoft Fluid User Interface

The Fluid Home initially displays the user's default home page. To access a different home page, the user taps the home page title and then selects a different home page from the list that appears.

Tapping a tile on a home page opens the corresponding transaction. Most of the delivered tiles open fluid pages, but a few open classic pages.

Personalization options enable users to choose which tiles appear on each home page.

PeopleSoft CRM includes four delivered home pages. The delivered home pages and their tiles are described in these topics:

- Using the HR HelpDesk Agent Home Page

- Using the HR HelpDesk Manager Home Page

- Using the HelpDesk Agent Home Page

- Using the HelpDesk Manager Home Page

Fluid Transactions and Conditional Navigation

If a fluid page is equivalent to a classic page, then in fluid mode, the classic menu provide navigation to the fluid page rather than to the classic page.

For example, when you are not in fluid mode, the classic menu includes the path **Main Menu** > **HelpDesk Center** > **Cases** > **Add Case**, which provides access to the classic Case page. In fluid mode, this menu path is not available, and instead the classic menu provides a path to the fluid page: **Fluid Home Page** > **Helpdesk Manager** > **Helpdesk Center.** This substitution means that the classic page is not accessible at all in fluid mode.

The logic that directs users to fluid page rather than an equivalent classic page is known as *conditional navigation.* Conditional navigation is also the mechanism that displays the fluid home when users initially access the system on a mobile device.

If a user on a desktop or laptop accesses a fluid home page and taps a tile, conditional navigation logic will not redirect the users to a classic page. Note, however, that PeopleSoft CRM delivers some tiles that open classic pages. This is not a function of conditional navigation. The tile opens a classic page because there is no fluid version of the page. The tile functions solely as a navigational shortcut to the classic page.

Documentation for the delivered home pages includes information about conditional navigation for the delivered fluid transactions:

Common Elements Used with PeopleSoft Fluid User Interface

A standard banner appears at the top of every fluid page. The banner includes the page title and these standard buttons:

Term	Definition
(Home)	Tap to return to the main PeopleSoft Home page.
(Search)	Tap to access PeopleSoft Global Search functionality. **Note:** Related actions from Global Search results are *not* supported on phones, but they are supported when viewed with laptops and tablets.
(Notifications)	Tap to view actions and alerts in a notifications window.
(Actions List)	Tap to see a list of available actions for the current window. The Sign Out command is always available under this menu, as are context-appropriate personalization options.
(Nav Bar)	Tap to use the Navigation Bar (Nav Bar). The Nav Bar provides handy navigation options such as Recent Places, My Favorites, Navigator (which expands to show the classic menu hierarchy), and Classic Home. Users can also add and remove fluid tiles from the Nav Bar using personalization options.

Understanding Drop Zones

Drop Zones allows you to add custom content such as editable or display only fields, links, buttons, or text. PeopleSoft has added Drop Zones to the top, middle, and bottom of some Fluid pages. You can create records, sub-pages, and other new objects you want to display using Drop Zones.

For more information on Drop Zones, see the product documentation for *PeopleTools: Fluid User Interface Developer's Guide,* "Creating Pages for Fluid Applications," Creating and Configuring Drop Zones.

Note: For future uptake of drop zones, use the *PeopleTools Features* tracking group. Enter the tracking group value *Drop Zone Support for PT8.57* (or above).

This video provides an overview of Drop Zones:

PeopleSoft Drop Zones

Find Drop Zone-Enabled Pages

To find which fluid pages have been enabled for drop zones:

1. Navigate to: **PeopleTools** > **Portal** > **Configure Drop Zones**

2. Enter the Component (listed in column 2 of the "Components Where Drop Zones are Enabled" topic that follows) into the **Component** field.

3. Click Search.

Lists drop zone-enabled pages by component.
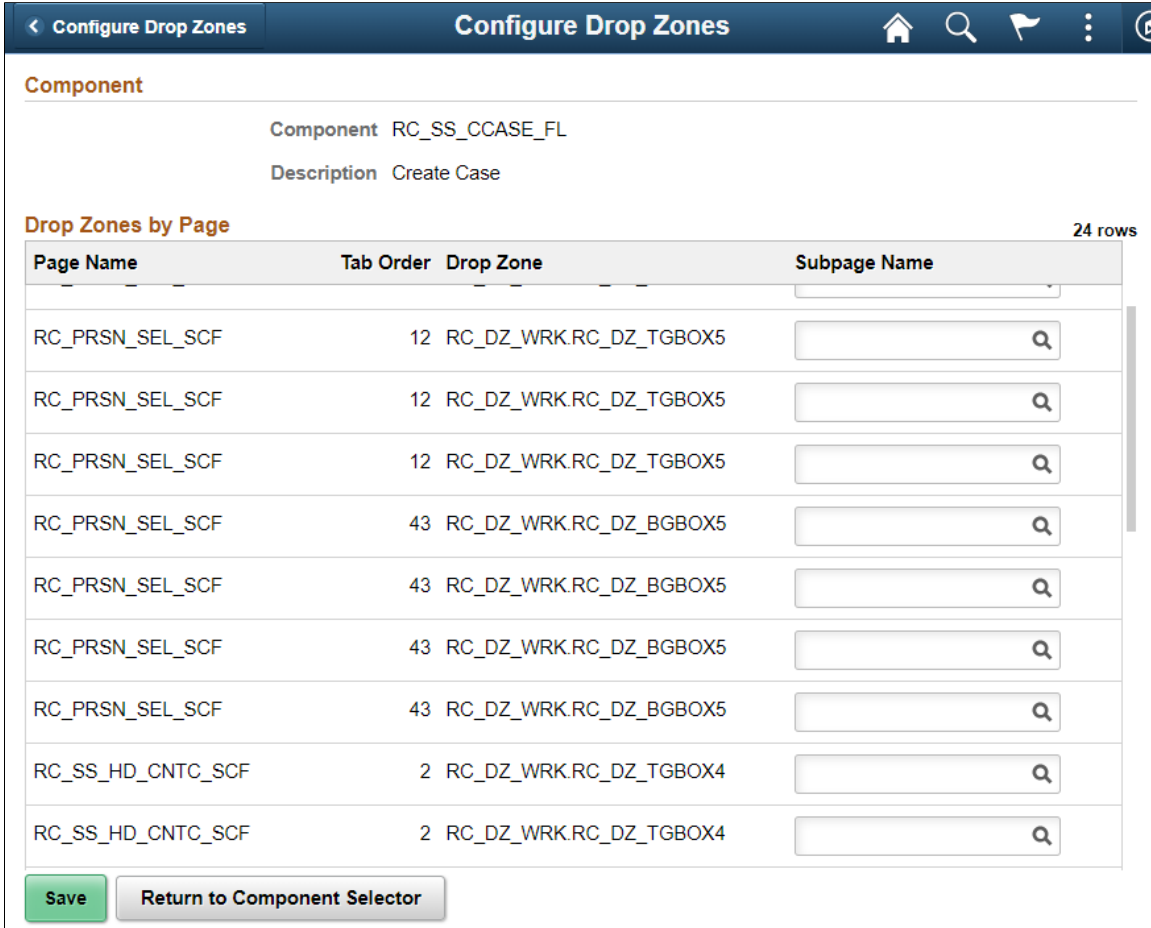
The Page Name column provides the Page ID for all pages, within the component, where drop zones are available.

Components Where Drop Zones are Enabled

This table lists the components where drop zones are enabled:

Product / Owner	Component	Component Description	Image Drop Zone Enabled
Agent Triage Dashboard	RC_AGT_DASHBRD_FL	Agent Triage Dashboard	Image 17
Agent Triage Dashboard	RC_AGTFLTR_PREF_FL	Agent Preference	Image 17
Agent Triage Dashboard	RC_AGT_TRIAGE_FL	Agent Triage	Image 17

Product / Owner	*Component*	*Component Description*	*Image Drop Zone Enabled*
Agent Triage Dashboard	RC_ADMFLTR_PREF_FL	Admin Preference	Image 17
AGT-Quick Update	RC_CSE_AGT_UPDT_FL	Quick Update Page	Image 17
Chat with Agent	RB_CHAT_PG_FL	Fluid Chat request page	Image 17
Create Case	RC_SS_HHD_STEP1_FL	Create Case Step 1	Image 17
Create Case	RC_SS_HHD_STEP2_FL	Create Case Step 2	Image 17
Create Case	RC_SS_HHD_SUBMT_FL	Case Submit Page	Image 17
Create Case	RC_SS_HHD_CONF_FL	Case submit confirmation	Image 17
Create Case	RC_SS_HHD_STEP3_FL	Create Case Step 3	Image 17
FAQ	RC_SS_FAQ_FL	FAQ	Image 17
HR Shortcuts	RC_SS_HR_SHORTS_FL	HR Shortcuts landing Page	Image 17
HRHD Integration	RC_CXT_FINDHELP_FL	Find Help Related Content	Image 17
HRHD Integration	RC_REL_MYCASE_FL	Self service cases listing Related Content	Image 17
Known Issues	RC_SS_ISSUES_FL	Known Issues Listing Component	Image 17
Manage Case	RC_PRSN_SEL_SCF	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_CLOSECSE_SCF	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_CONTACT_FL	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_HD_CNTC_SCF	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_INTPARTY_SCF	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_NOTE_ADD_SCF	HelpDesk - Manage Case	Image 17

Product / Owner	Component	Component Description	Image Drop Zone Enabled
Manage Case	RC_SS_REOPEN_SCF	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_SOLN_DTL_SCF	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_UPDATES_FL	HelpDesk - Manage Case	Image 17
Manage Case	RC_SS_DETAILS_FL	HelpDesk - Manage Case	Image 17
My Cases	RC_CASE_SS_SRCH_FL	Self service cases listing Page	Image 17
MY ER CASES-AGT	RC_ASG_CASE_ER_FL	My ER Cases	Image 17
MY HRHD CASES-AGT	RC_ASG_CASE_HHD_FL	My HRHD Cases	Image 17
Pivot grid Analytics (Manager & Agent)	RC_NOTIFY_FL	Related Content for Pivot Grid	Image 17
Pivot grid Analytics (Manager & Agent)	RC_PG_CNTCT_FL	Related Content for Pivot Grid	Image 17
Pivot grid Analytics (Manager & Agent)	RC_CASE_NOTE_FL	Related Content for Pivot Grid	Image 17
Pivot grid Analytics (Manager & Agent)	RC_REASIGN_CASE_FL	Related Content for Pivot Grid	Image 17
Search for Answers	RC_SS_SRCH_ANS_FL	Search for Answers	Image 17
Search for Answers	RC_SS_LANDING_FL	Search for Answers	Image 17
Solution Details	RC_SS_EMAIL_SCF	Solution Details	Image 17
Solution Details	RC_SS_SOLN_DTL_FL	Solution Details	Image 17
Top Solution	RC_SS_TOPSOLN_FL	Top Solutions listing page	Image 17

Using the HR HelpDesk Manager Home Page

This topic describes the delivered home page for HR HelpDesk managers.

Page Used as the HR HelpDesk Manager Home Page

Page Name	Definition Name	Usage
HR HelpDesk Manager Home Page	CR_RC_HR_HELPDESK_MANAGER	Access a variety of HR HelpDesk actions applicable for managers.

HR HelpDesk Manager Home Page

Use the HR HelpDesk manager home page to access a variety of HR HelpDesk related actions applicable for managers.

Navigation:

In fluid mode, the fluid home appears when you first sign in. You can also access the fluid home by selecting **Fluid Home** under the main menu or the navigation bar (nav bar).

The default home page title appears at the top of the home page. If the HR HelpDesk home page is not your default home page, tap the title of the default home page and select HR HelpDesk Manager from the list that appears.

This example illustrates the HR HelpDesk Manager home page for the tablet.

This example illustrates the HR HelpDesk manager home page for the smartphone. Action buttons, which appear on the page banner when viewed with a laptop or tablet, are available in the actions list when viewed with a smartphone.

PeopleSoft CRM Tiles on the HR HelpDesk Manager Home Page

The following table describes the tiles on the delivered HR HelpDesk manager home page. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to fluid transactions and conditional navigation when the user is in fluid mode. For more details on this, see Understanding PeopleSoft Fluid User Interface Home Pages

On the home page, users can personalize the tile order.

Use the links in the table to access complete documentation for each action.

Note: Several tiles are not shown on small form factors (phones). The only tiles that are shown on phones small form factors are HRHD Manager Dashboard and HR HelpDesk Center.
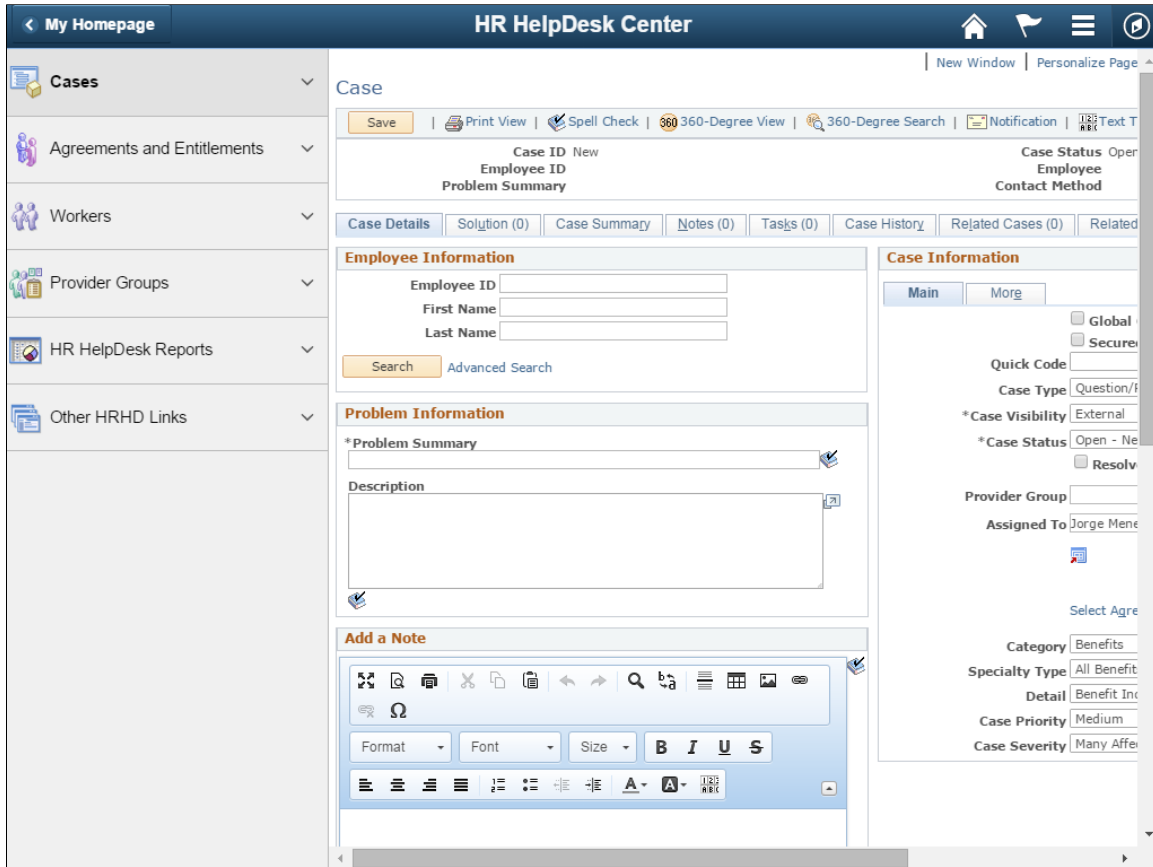

Tile Name	Description	Navigation to Equivalent Classic Pages
HRHD Manager Dashboard	Use the HRHD Manager Dashboard tile to access the HRHD Manager dashboard page.	Select Classic Home under the main menu. On the page that appears, select HR HelpDesk Manager. You can access the following pagelets: • Manager Case Backlog. • Case Age Analysis by Category. • Case Arrival vs. Closure. For more details see "Using the PeopleSoft Fluid HR Helpdesk - Manager Analytics" (PeopleSoft Call Center Applications)
HRHD 360 Degree View	Use the HRHD 360 Degree View tile to initiate transactions and manage activities that relate to the HR data for workers or persons of interest.	Select Classic Home under the main menu. On the page that appears, select Worker 360 Degree View.
HR HelpDesk Center	Use the HR HelpDesk Center tile to access the HR HelpDesk Center page. For more details see HR HelpDesk Center Fluid Page	Select Classic Home under the main menu. On the page that appears, select HR HelpDesk Center.
My Worklist	Use the My Worklist tile to access the My Worklist page.	Select Classic Home under the main menu. On the page that appears, select My Woklist.
My Tasks	Use the My Tasks tile to access the My Tasks page.	Select Classic Home under the main menu. On the page that appears, select My Tasks.
My Calendar	Use the My Calendar tile to access the My Calendar page.	Select Fluid Home under the main menu. On the page that appears, select My Calendar.

HR HelpDesk Center Fluid Page

The HR HelpDesk Center Fluid Page organizes a collection of navigation for quick access to various HR HelpDesk transactions.

HR HelpDesk Center Fluid page

Navigation Collection	Usage
Cases	Use this navigation collection to access various transaction related to cases. For more information, see "Creating Cases" (PeopleSoft Call Center Applications) "Managing Existing Self-Service Application Cases" (PeopleSoft Call Center Applications)
Agreements and Entitlements	Use this navigation collection to to access various transactions related to Agreements and Entitlements. For more details, see Agreements and Warranties and Understanding Entitlement Searches
Workers	Use this navigation collection to access transactions related to workers. For more information, see "Understanding Workers in CRM" (Business Object Management)
Provider Groups	Use this navigation collection to access transactions related to Provider Groups. For more information, see Defining Provider Groups

Navigation Collection	Usage
HR HelpDesk Reports	Use this option to access the Query Viewer to search for HR HelpDesk Reports
Other HRHD Links	Use this navigation collection to access the HRMS employee and manager self-service pages.

Using the HR HelpDesk Agent Home Page

This topic describes the delivered home page for HR HelpDesk agents.

Page Used as the HR HelpDesk Agent Home Page

Page Name	Definition Name	Usage
HR HelpDesk Agent Home Page	CR_RC_HR_HELPDESK_AGENT	Access a variety of HR HelpDesk actions applicable for agents.

HR HelpDesk Agent Home Page

Use the HR HelpDesk agent home page to access a variety of HR HelpDesk agent related actions.
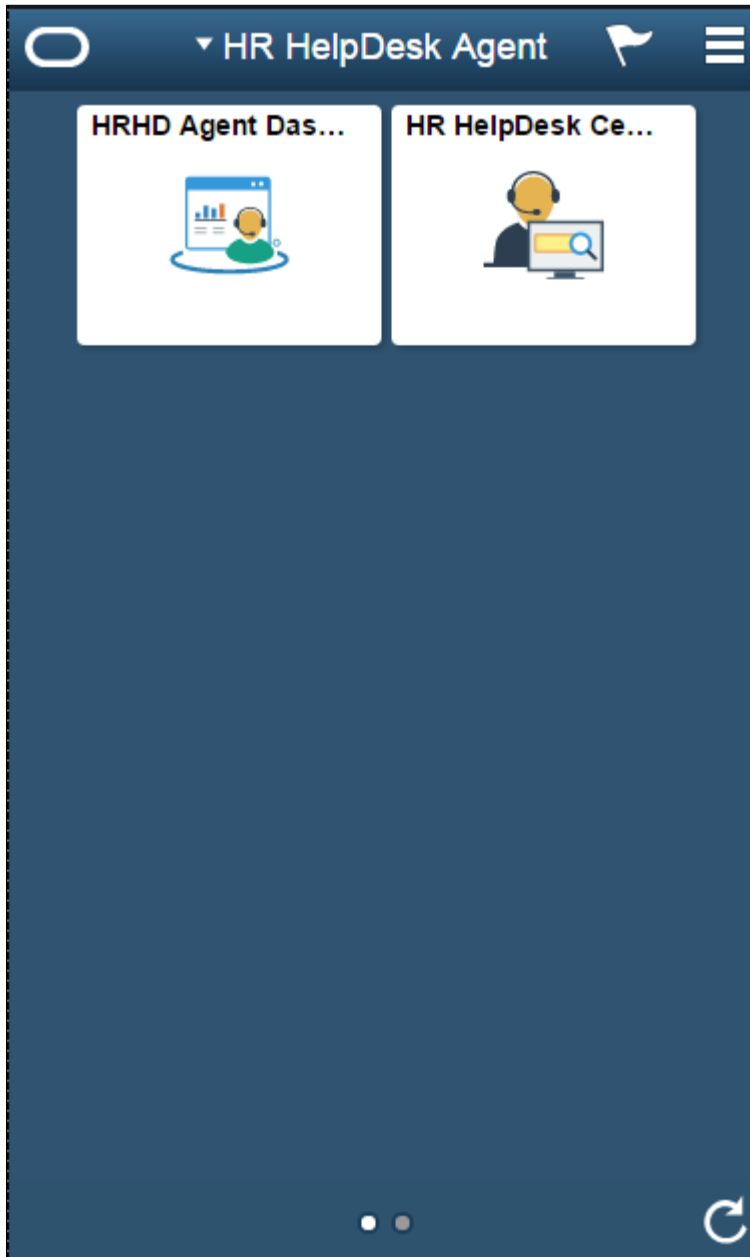
Navigation:

In fluid mode, the fluid home appears when you first sign in. You can also access the fluid home by selecting **Fluid Home** under the main menu or the navigation bar (nav bar).

The default home page title appears at the top of the home page. If the HR HelpDesk home page is not your default home page, tap the title of the default home page and select HR HelpDesk Agent from the list that appears.

This example illustrates the HR HelpDesk Agent home page for the tablet.

This example illustrates the HR HelpDesk Agent home page for the smartphone. Action buttons, which appear on the page banner when viewed with a laptop or tablet, are available in the actions list when viewed with a smartphone.

PeopleSoft CRM Tiles on the HR HelpDesk Agent Home Page

The following table describes the tiles on the delivered HR HelpDesk agent home page. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to fluid transactions and conditional navigation when the user is in fluid mode. For more details on this, see Understanding PeopleSoft Fluid User Interface Home Pages

On the home page, users can personalize the tile order.

Use the links in the table to access complete documentation for each action.

Note: Several tiles are not shown on small form factors (phones). The only tiles that are shown on phones small form factors are HR HelpDesk Agent Dashboard and HR HelpDesk Center.

Tile Name	Description	Navigation to Equivalent Classic Pages
HRHD Agent Dashboard	Use the HRHD Agent Dashboard tile to access the HRHD agent dashboard page.	Select Classic Home under the main menu. On the page that appears, select HRHD Agent Dashboard..
Worker 360 Degree View	Use the HRHD 360 Degree View tile to access the Search For Worker page.	Select Classic Home under the main menu. On the page that appears, select Worker 360 Degree View.
HR HelpDesk Center	Use the HR HelpDesk Center tile to access the Case page.	Select Classic Home under the main menu. On the page that appears, select HR HelpDesk Center.
My Worklist	Use the My Worklist tile to access the My Worklist page.	Select Classic Home under the main menu. On the page that appears, select My Worklist.
My Tasks	Use the My Tasks tile to access the My Tasks page.	Select Classic Home under the main menu. On the page that appears, select My Tasks.
My Calendar	Use the My Calendar tile to access the My Calendar page.	Select Classic Home under the main menu. On the page that appears, My Calendar.

Using the HelpDesk Agent Home Page

This topic describes the delivered home page for HelpDesk agents.

Page Used as the HelpDesk Agent Home Page

| Page Name	Definition Name	Usage
HelpDesk Agent Home Page	CR_RC_IT_HELPDESK_AGENT	Access a variety of HelpDesk actions applicable for agents.

HelpDesk Agent Home Page

Use the HelpDesk agent home page to access a variety of HelpDesk agent related actions.
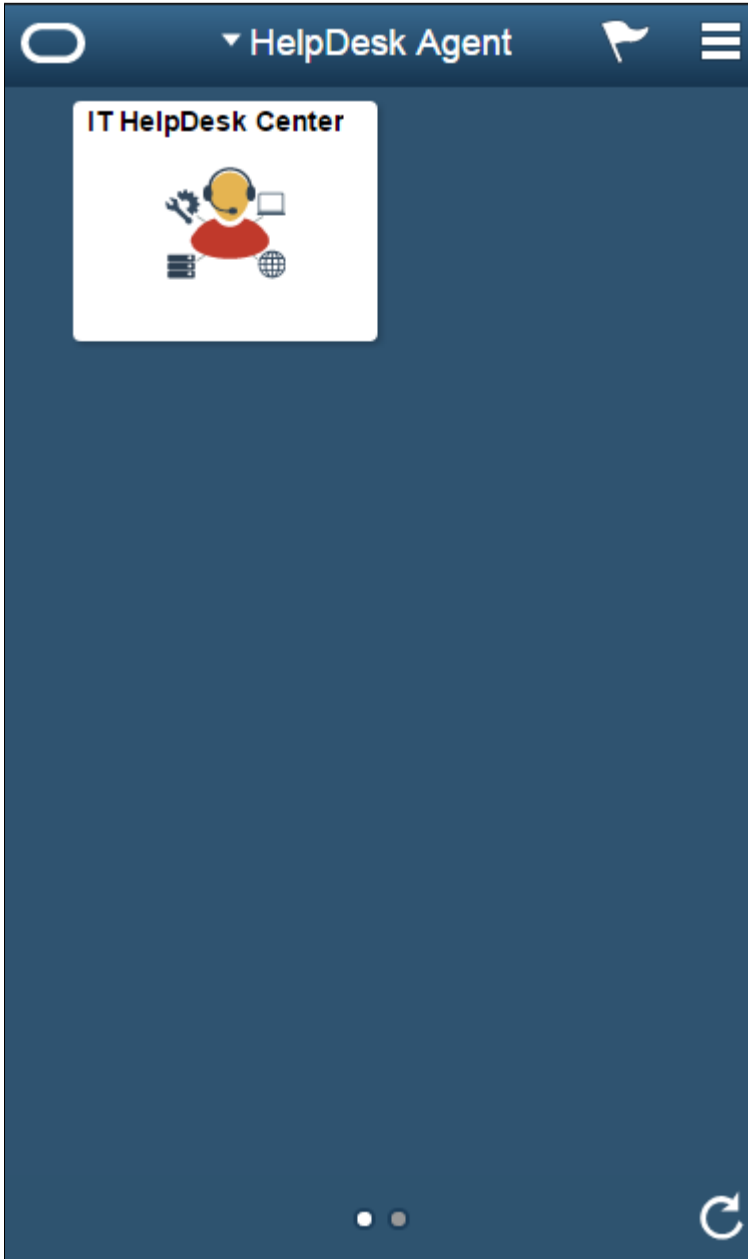
Navigation:

In fluid mode, the fluid home appears when you first sign in. You can also access the fluid home by selecting **Fluid Home** under the main menu or the navigation bar (nav bar).

The default home page title appears at the top of the home page. If the HelpDesk home page is not your default home page, tap the title of the default home page and select HelpDesk Agent from the list that appears.

This example illustrates the HelpDesk Agent home page for the tablet.
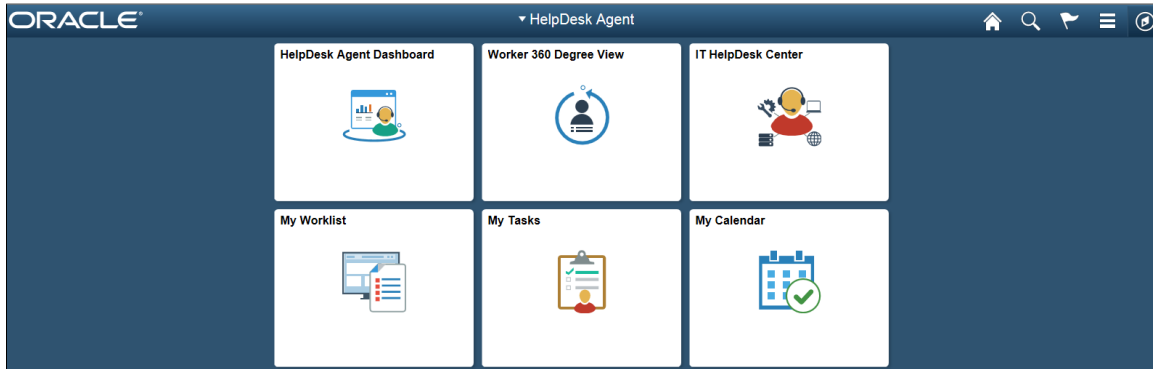
This example illustrates the HelpDesk agent home page for the smartphone. Action buttons, which appear on the page banner when viewed with a laptop or tablet, are available in the actions list when viewed with a smartphone.

PeopleSoft CRM Tiles on the HelpDesk Agent Home Page

The following table describes the tiles on the delivered HelpDesk agent home page. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to fluid transactions and conditional navigation when the user is in fluid mode. For more details, see Understanding PeopleSoft Fluid User Interface Home Pages

On the home page, users can personalize the tile order.

Use the links in the table to access complete documentation for each action.

Note: Several tiles are not shown on small form factors (phones). The only tile that is shown on phones small form factors is IT HelpDesk Center.

Tile Name	Description	Navigation to Equivalent Classic Pages
HelpDesk Agent Dashboard	Use the HelpDesk Agent Dashboard tile to access the HelpDesk agent dashboard page.	Select Classic Home under the main menu. On the page that appears, select HelpDesk Agent Dashboard.
Worker 360 Degree View	Use the Worker 360 Degree View tile to access the Search For Worker page.	Select Classic Home under the main menu. On the page that appears, select Worker 360 Degree View.
IT HelpDesk Center	Use the IT HelpDesk Center tile to access the Case page.	Select Classic Home under the main menu. On the page that appears, select IT HelpDesk Center.
My Worklist	Use the My Worklist tile to access the My Worklist page.	Select Classic Home under the main menu. On the page that appears, select My Worklist.
My Tasks	Use the My Tasks tile to access the My Tasks page.	Select Classic Home under the main menu. On the page that appears, select My Tasks.
My Calendar	Use the My Calendar tile to access the My Calendar page.	Select Classic Home under the main menu. On the page that appears, select My Calendar.

Using the HelpDesk Manager Home Page

This topic describes the delivered home page for HelpDesk managers.

Page Used as the HelpDesk Manager Home Page

| Page Name	Definition Name	Usage
HelpDesk Manager Home Page	CR_RC_IT_HELPDESK_MANAGER	Access a variety of HelpDesk actions applicable for managers.

HelpDesk Manager Home Page

Use the HelpDesk Manager Home Page to access a variety of HelpDesk Manager related actions.
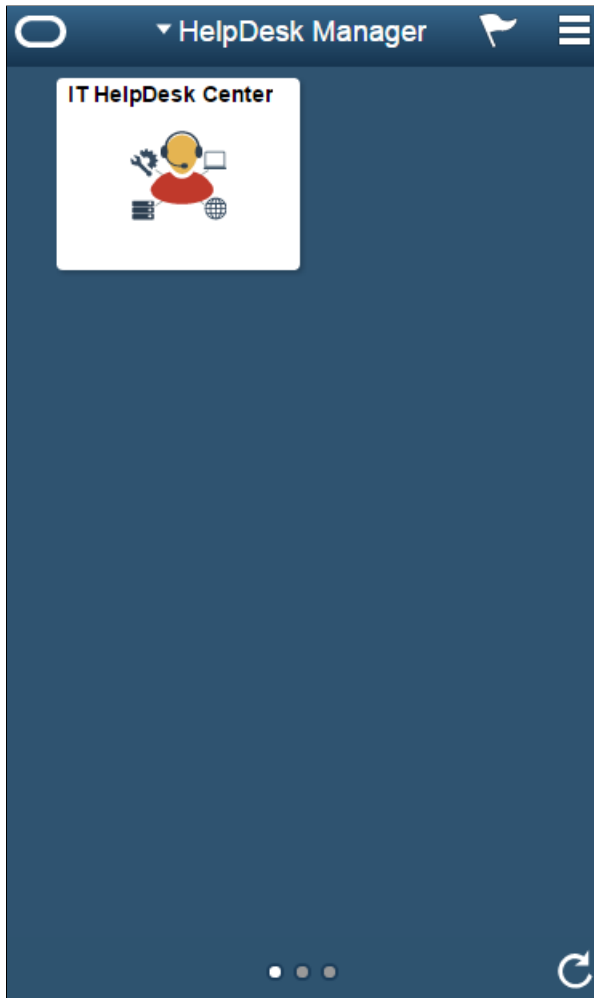
Navigation:

In fluid mode, the fluid home appears when you first sign in. You can also access the fluid home by selecting **Fluid Home** under the main menu or the navigation bar (nav bar).

The default home page title appears at the top of the home page. If the HelpDesk manager home page is not your default home page, tap the title of the default home page and select HelpDesk Manager from the list that appears.

This example illustrates the HelpDesk Manager home page for the tablet.
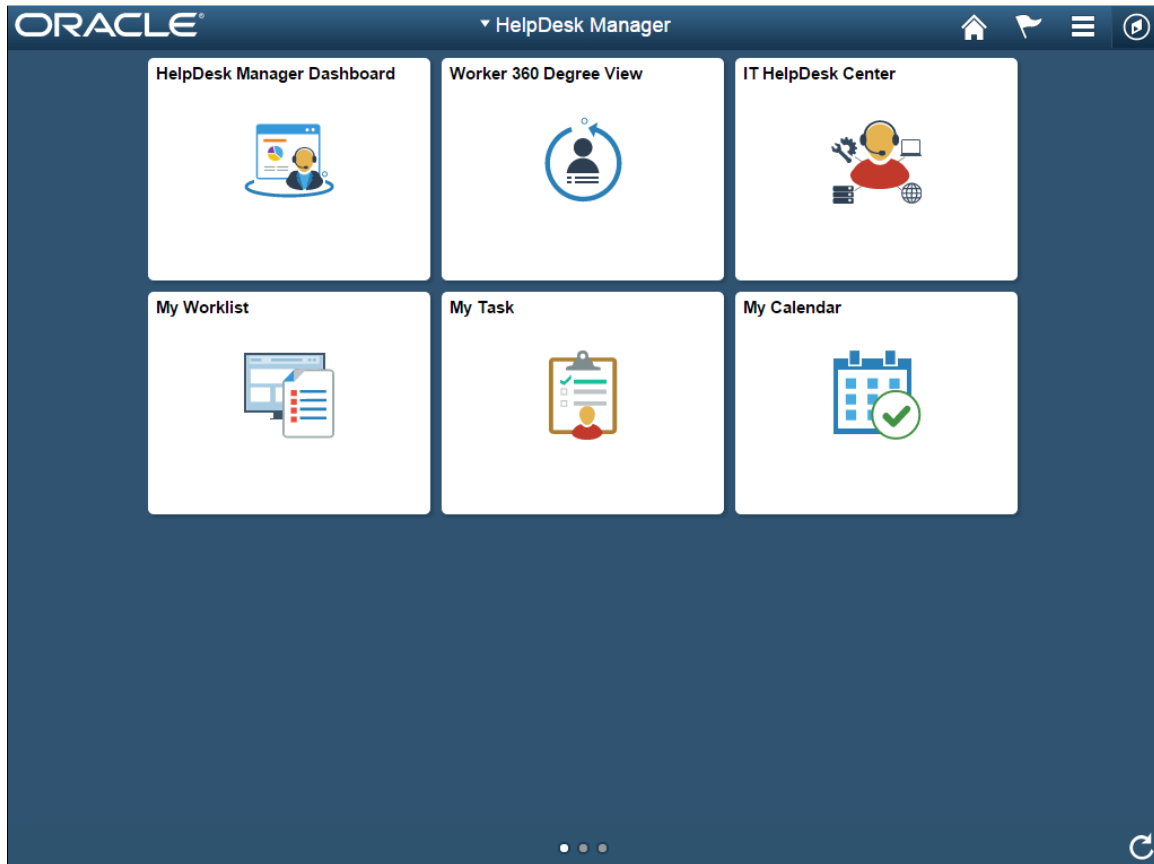
This example illustrates the HelpDesk manager home page for the smartphone. The Action buttons are available in the actions list when viewed with a smartphone.

PeopleSoft CRM Tiles on the HelpDesk Manager Home Page

The following table describes the tiles on the delivered HelpDesk Manager home page. The table also identifies navigation paths to equivalent classic pages. These are the menu paths that are replaced by fluid navigation paths due to fluid actions and conditional navigation, when the user is in fluid mode. For more details on this, see Understanding PeopleSoft Fluid User Interface Home Pages

On the home page, users can personalize the tile order.

Note: Several tiles are not shown on small form factors (phones). The only tile that is shown on phones small form factors is IT HelpDesk Center.

Tile Name	Description	Navigation to Equivalent Classic Pages
HelpDesk Manager Dashboard	Use the HelpDesk Manager Dashboard tile to access the HelpDesk manager dashboard page.	Select Classic Home under the main menu. On the page that appears, select HelpDesk Manager. The HelpDesk Manager Dashboard tile is available on the HelpDesk Manager landing page.
Worker 360 Degree View	Use the Worker 360 Degree View tile to access the Search For Worker page.	Select Classic Home under the main menu. On the page that appears, select Worker 360 Degree View.
IT HelpDesk Center	Use the HelpDesk Center tile to access the Case page.	Select Classic Home under the main menu. On the page that appears, select IT HelpDesk Center.
My Worklist	Use the My Worklist tile to access the My Worklist page.	Select Classic Home under the main menu. On the page that appears, select My Worklist.
My Tasks	Use the My Tasks tile to access the My Tasks page.	Select Classic Home under the main menu. On the page that appears, select My Tasks.
My Calendar	Use the My Calendar tile to access the My Calendar page.	Select Classic Home under the main menu. On the page that appears, select My Calendar..

HelpDesk Center Fluid Page

The HelpDesk Center Fluid Page organizes a collection of navigation for quick access to various HelpDesk transactions.

HelpDesk Center Fluid Page

Navigation Collection	Usage
Cases	Use this navigation collection to access various transaction related to cases. For more information, see "Creating Cases" (PeopleSoft Call Center Applications) and "Managing Existing Self-Service Application Cases" (PeopleSoft Call Center Applications)
Agreements and Entitlements	Use this navigation collection to to access various transactions related to Agreements and Entitlements. For more details, see Agreements and Warranties and Understanding Entitlement Searches
Workers	Use this navigation collection to access transactions related to workers. For more information, see "Understanding Workers in CRM" (Business Object Management)

Navigation Collection	Usage
Provider Groups	Use this navigation collection to access transactions related to Provider Groups. For more information, see Defining Provider Groups
HelpDesk Reports	Use this option to access the Query Viewer to search for HelpDesk Reports.