
PeopleSoft CRM 9.2: PeopleSoft Call Center Applications

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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 PeopleSoft Online Help

If you're setting up an on-premises 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. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, 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.

<i>Typographical Convention</i>	<i>Description</i>
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W , hold down the Alt key while you press the W key.
. . . (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.

<i>Typographical Convention</i>	<i>Description</i>
⇒	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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Send your suggestions to pssoft-infodev_us@oracle.com.

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

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	<u>Connect with PeopleSoft on LinkedIn</u>

Getting Started with PeopleSoft CRM Call Center Applications

PeopleSoft CRM Call Center Applications Overview

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

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

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

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

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

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

PeopleSoft CRM Call Center Business Processes

This topic discusses the business processes that you can perform using PeopleSoft CRM call center applications. We discuss these business processes in greater detail in the business process topics in this documentation. You'll find greater detail for each in the corresponding business process topics.

Business Processes for Call Center Applications

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

- Create and manage cases, including those originating in a third-party system.
- Configure the Case page to display the information, fields, and layout specific to your support and information-gathering requirements.
- Use a skills-based assignment engine to assign cases to the agents and provider groups that are most qualified to handle the cases.
- Create and manage solution libraries, search the solution library using text searches, and search for and view defects and enhancements.
- Track both successful and unsuccessful attempts to resolve cases.
- Embed analytics to suggest next actions and provide related dialogs based on the information and responses entered for a case.
- Deploy self-service transactions that callers can use to search for solutions and to report, review, and update their own cases.
- Relate cases to each other.
- Enable chat for self-service customers.
- Manage work using structured task lists known as business projects.
- Add and track tasks.
- Use troubleshooting scripts, customer satisfaction scripts, and surveys to gather information from callers.
- Assign system access to users by role using authentication tokens.
- Invoice customers for services rendered, regardless of whether a service agreement is in place (used only for PeopleSoft Support).
- Associate service-level agreements with cases to gain insight into performance against targeted service levels and related agreements.
- Use reports and charts to analyze and manage overall call center operations.

PeopleSoft Support Business Processes

PeopleSoft Support enables you to:

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

PeopleSoft HelpDesk Business Processes

PeopleSoft HelpDesk enables you to:

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

PeopleSoft HelpDesk for Human Resources Business Processes

PeopleSoft HelpDesk for Human Resources enables you to:

- Access the HelpDesk for Human Resources 360-Degree View page to see a summary of relevant human resources (HR) and CRM data for any worker.
- Give agents single-click access from a case to specific transactions in the HR system.
- Use reports and charts to analyze and manage help desk operations.

Service Center for Higher Education

PeopleSoft Service Center for Higher Education enables you to:

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

PeopleSoft Quality Management

PeopleSoft Quality Management enables you to:

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

PeopleSoft Change Management

PeopleSoft Change Management enables you to:

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

PeopleSoft CRM Call Center Integrations

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

Integration with Other PeopleSoft CRM Applications

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

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

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

Call center applications integrate with these PeopleSoft applications:

- Integrated FieldService.
- Sales.
- Order Capture.

- Contracts.
- Asset Management.
- Services Procurement (work order integration).
- Online Marketing (surveys).

Integration with External Systems

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

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

To protect sensitive data, the information is not stored in the PeopleSoft CRM system.

- Real-time EIPs for Service Center for Higher Education enable you to view constituent data from PeopleSoft Campus Solutions.
- The Worker EIP synchronizes worker information with other systems.

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

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

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

- The Systems Management integration framework provides a mechanism for integrating third-party network management applications.
- Integration with PeopleSoft Contracts or any third-party billing application enables the invoicing of agreement-based service orders as they are generated during a support call.
- Integrations with PeopleSoft Service Procurement and Maintenance Management enable users to create work orders in PeopleSoft Financials.

Related Links

“EIPs in PeopleSoft CRM” (Business Object Management)

“Business Object Relationship Modelling” (Business Object Management)

PeopleSoft Call Center Applications Implementation

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

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

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

Component	Component Interface	References
RC_CASE_TYPE	RC_CASE_TYPE_CI	See Setting Up Basic Prompt Tables for Cases .
RC_PRIORITY	RC_PRIORITY_CI	See Setting Up Basic Prompt Tables for Cases .
RC_PROBTYPE	RC_PROBTYPE_CI	See Setting Up Basic Prompt Tables for Cases .
RC_SEVERITY	RC_SEVERITY_CI	See Setting Up Basic Prompt Tables for Cases .
RC_STATUS	RC_STATUS_CI	See Setting Up Basic Prompt Tables for Cases .
RC_QUICK_CODE	RC_QUICK_CODE_CI	See Setting Up Basic Prompt Tables for Cases .
RBT_TGUIDE_SETUP	RBT_TGUIDE_SETUP_SCI	See Configuring Troubleshooting Guide .
RC_SOLN_LIB_SETUP	RC_SOLN_LIB_SETUP_SCI	See Configuring Troubleshooting Guide .
RC_CTD_DEFINE	RC_CTD_DEFINE_CI	See Setting Up Basic Prompt Tables for Cases .
RC_CTD_COMBINE	RC_CTD_COMBINE_CI	See Setting Up Basic Prompt Tables for Cases .

Other Sources of Information

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

See the product documentation for *PeopleTools: Setup Manager* and *PeopleTools: Component Interfaces*.

Chapter 2

Defining Call Center Business Units and Display Template Options

Understanding Call Center Business Units

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

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

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

See “Understanding TableSet Controls in PeopleSoft CRM” (Application Fundamentals).

Understanding Display Templates

This topic discusses:

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

Appearance and Behavior Control

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

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

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

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

Use display templates to control:

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

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

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

Display Template Families

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

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

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

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

Related Links

“Understanding Display Templates” (Automation and Configuration Tools)

AAF Policies and Display Templates

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

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

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

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

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

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

Related Links

“Understanding AAF” (Automation and Configuration Tools)

Defaulting Logic

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

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

Display Template Family Defaulting Logic

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

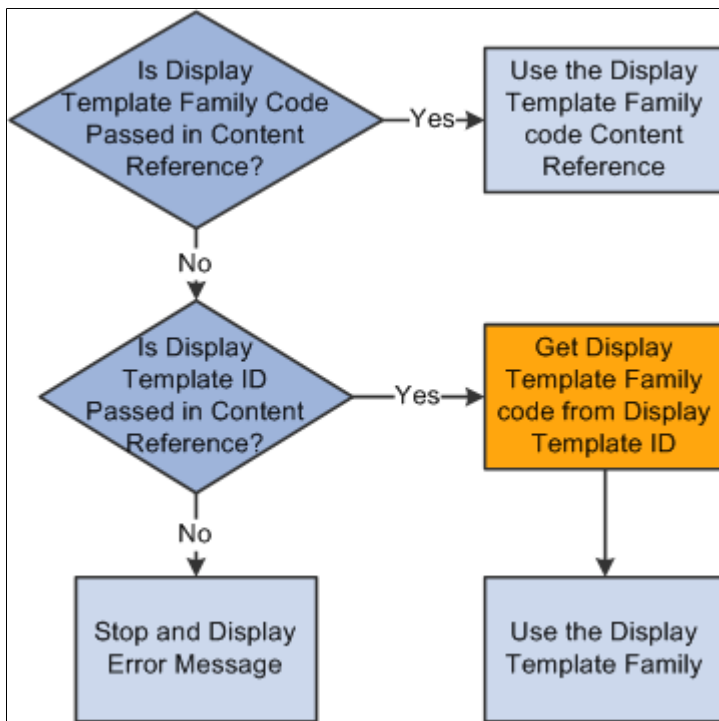
This logic is only used to add a new case. When updating an existing case, the system retrieves the display template family information from the existing Case record.

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

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

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

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

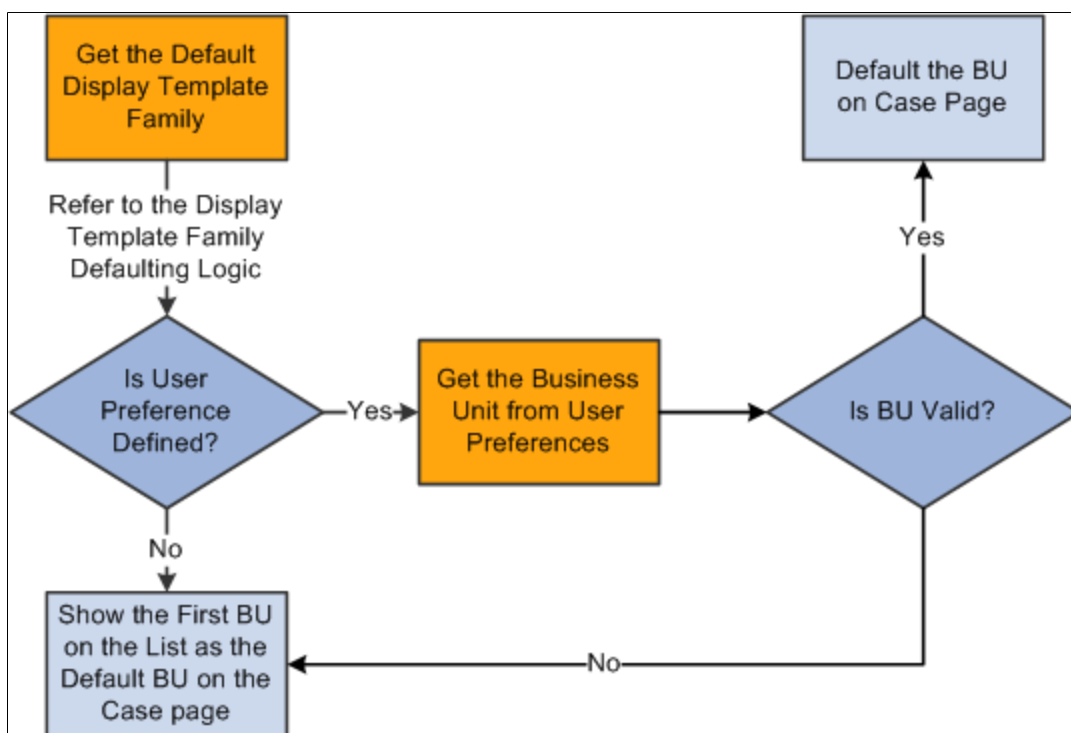


Business Unit Defaulting Logic

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

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

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



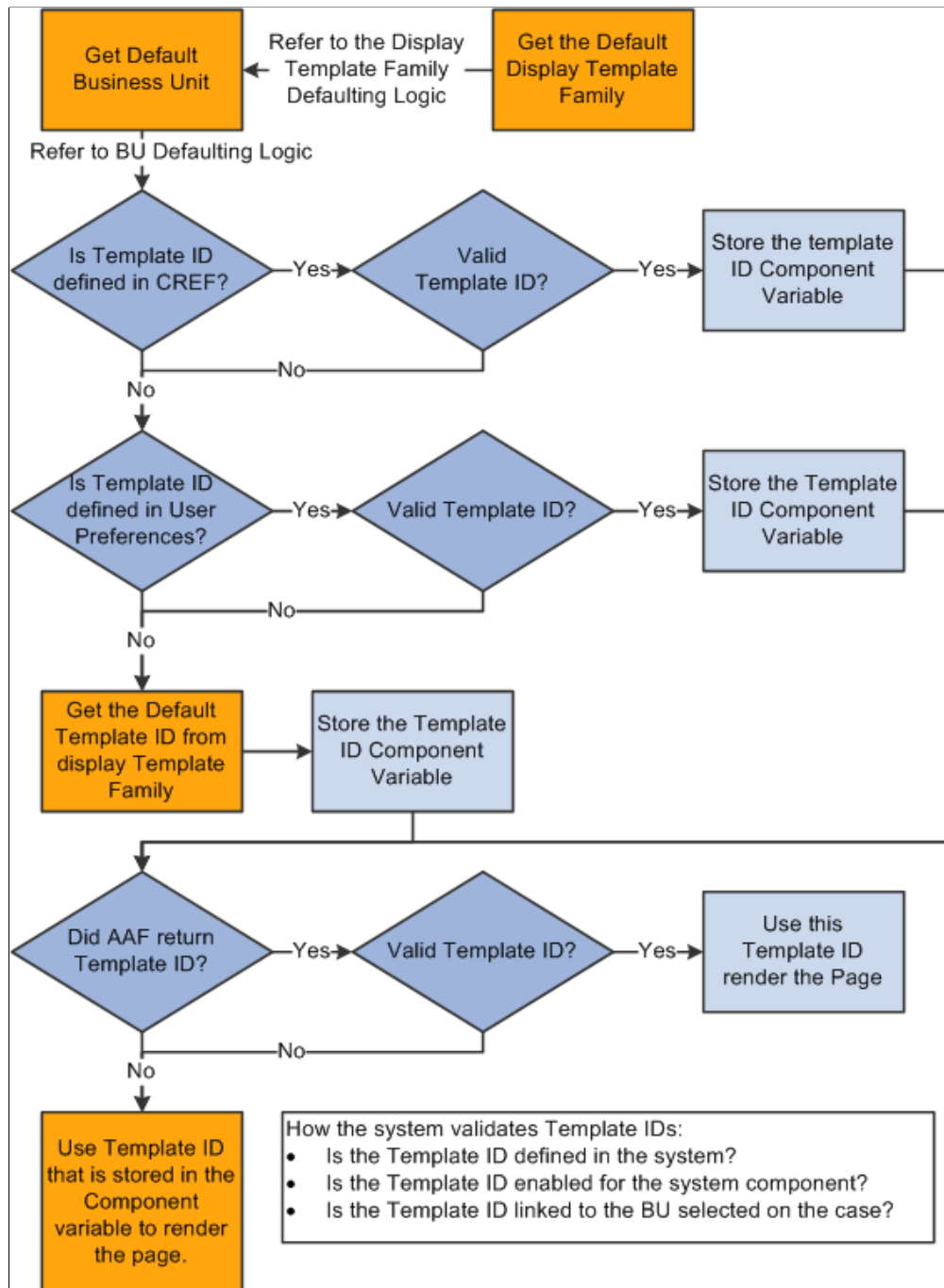
Display Template ID Defaulting Logic

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

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

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

This flowchart shows the defaulting logic that the system uses.



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

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

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

Understanding Assignment Options

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

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

This topic discusses:

- Provider group assignment.
- Person assignment.

See “Understanding Provider Groups and Group Members” (Application Fundamentals).

Provider Group Assignment

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

<i>Field or Control</i>	<i>Description</i>
None	Select <i>None</i> if you do not want any automatic assignment to occur; assignments must be made manually. Note: Delivered AAF policies for cases send notifications to the agent or provider group that is assigned to a newly created case. If you allow unassigned cases to be saved, you should define a mechanism for routing and handling these cases.

<i>Field or Control</i>	<i>Description</i>
Any	Select <i>Any</i> or <i>Available</i> to invoke the assignment engine when the case is saved. If you select <i>Any</i>, the assignment engine finds the worker or provider group with the highest overall fit score. Note: If a user manually assigns an agent to the case and the agent is in exactly one provider group, the system automatically assigns the agent's provider group to the case when it is saved. If the agent is in more than one provider group, the system leaves the Provider Group field blank on the Case page when the case is saved. You could, however, have a provider group that is available and none of the workers are available.
Available	Select <i>Any</i> or <i>Available</i> to invoke the assignment engine when the case is saved. If you select <i>Available</i>, the assignment engine looks only at provider groups that are currently available according to the schedules you create.
Default	Select <i>Default</i> to assign a case to its creator. This value does not invoke the assignment engine. If you select <i>Default</i>, the system will address whether an agent is on the case. If an agent is on the case and that agent is in only one provider group, the system assigns that provider group as the <i>Default</i> provider group. Otherwise, the system leaves the Provider Group field blank. Selecting <i>Default</i> forces the system to find the group for the agent that has already been selected. If the agent is a member of more than one group, the system leaves the Provider Group blank. Note: This option is available only for cases created by agents, not for cases created by self-service application users. However, you can set up a self-service provider group on the Case Defaults page using the Assigned to Provider Group field for self-service call center components.

Person Assignment

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

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

Field or Control	Description
None	Indicates that the system does not assign new cases to agents. Note: Be aware that delivered AAF policies for cases send notifications to the agent or provider group that is assigned to a newly created case. If you allow agents to save unassigned cases, you should define a mechanism for routing and handling those cases.
Any	Select to have the assignment engine assign the case to the person with the highest fit score (if a provider group was previously entered, either manually or through auto-assignment). If the system did not assign a provider group, then it does not assign an agent either.
Available	Select to have the assignment engine check worker schedules and assign cases only to agents who are available at the time the case is assigned. Note: The <i>Any</i> and <i>Available</i> options use the assignment engine. For the assignment engine to assign an agent, a provider group must already be assigned.

<i>Field or Control</i>	<i>Description</i>
Default	Select to have the system assign the case to the agent who created the case. This setting only applies if the case is new. If you update an existing case and clear the Assigned To field, the system leaves it blank. This functionality is true for the other assignment options as well. If you want to run the assignment engine after the initial creation of the case, you need to use the Suggest a Provider Group and Suggest an Agent buttons next to the fields. The system handles case assignments according to these rules: • If a provider group is specified, either manually or through auto-assignment, the system does not assign the case to an agent. • If no provider group is specified, the system assigns the case to the agent who created the case. • If the provider group auto-assignment option is also Default, then the system assigns the case to the agent's provider group (assuming that one can be uniquely identified). Note: This option is for cases created by agents. For cases created through a self-service application, you can set up a default provider group on the Case Defaults page that you can use for self-service. The system will assign a provider group, but it will not assign an agent. See “Understanding Assignment Searches” (Application Fundamentals).

Defining Call Center Business Units

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

This topic lists prerequisites and discusses how to define call center business units.

Pages Used to Define Call Center Business Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Call Center BU Page</u>	BUS_UNIT_RC1	Create call center business units and establish default business units to use when integrating with other PeopleSoft applications.

Page Name	Definition Name	Usage
<u>Business Unit - Options Page</u>	BUS_UNIT_RC2	Define business rules for a call center business unit.
<u>Match Usage Page</u>	RC_MATCH_SUMMARY	View the case matching criteria defined for this business unit and associated SetID.
<u>Business Unit - Display Templates Page</u>	BUS_UNIT_RC_RDT	Associate display template families and display templates with the business unit.
<u>Case Defaults Page</u>	BUS_UNIT_RC_DEF	Set up defaults for all call center applications.

Related Links

“Understanding Business Units in PeopleSoft CRM” (Application Fundamentals)

“Understanding TableSet Controls in PeopleSoft CRM” (Application Fundamentals)

Prerequisites

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

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

Call Center BU Page

Use the Call Center BU page (BUS_UNIT_RC1) to create call center business units and establish default business units to use when integrating with other PeopleSoft applications.

Navigation:

Set Up CRM > Business Unit Related > Call Center Definition > Call Center BU

This example illustrates the fields and controls on the Call Center BU page.

Call Center BU

Business Unit EUR01

Business Unit Description

*Description

European Operations

*Short Description

Euro Ops

*Default SetID

EUR01

*Status

Open

Create BU

Self-Service Description

Service Order Unit

RMA Unit

Sales Unit

Quality Unit

Order Capture Unit

Online Marketing Unit

Change Unit

Credit Card Vendor

Modified

* Required Field

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

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

Business Unit Description

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

Field or Control	Description
Default SetID	The Default SetID field appears only when you open the Call Center BU page in Add mode. Once you create the business unit, the system sets up default tableset control information, and you must use the TableSet Control page to change the default. Enter or select the default setID for the business unit. When you create a business unit, the system copies the setID for each record group from the tableset control of the setID you have entered. In the tableset control record, each of the delivered record groups is associated with the setID that you enter here or a setID that is being shared (SHARE) with other setIDs. Note: The system will always create a setID that is equal to the business unit that you create. Every business unit is also a setID.
Status	Indicates the call center status. Values are: <i>Open</i> (active) or <i>Closed</i> (inactive). The system does not process transactions for closed business units. Note: You cannot create a new case for a closed business unit, but you can continue working a case that has already been created with a business unit that was closed after the case was opened.
Create BU (create business unit)	This button appears only when you open the Call Center BU page in Add a New Business Unit mode. Click to establish the tableset controls for the call center business unit based on the default setID that you specify. Other pages in the component and many of the fields on this page are unavailable until you click the Create BU button to create the business unit.

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

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

Field or Control	Description
Self-Service Description	Enter a description for self-service application users. This description should be meaningful to users who are unfamiliar with the organization of your call center business unit.
Service Order Unit	Enter the default FieldService business unit to use when creating service orders from call center cases. When you establish tableset sharing, ensure that the field service business unit and the call center business unit prompt against the same set of customers.
RMA Unit (return material authorization unit)RMA Unit	Enter the default RMA business unit to use when creating a return material authorization from a case.
Sales Unit Sales Unit field	Enter the default Sales business unit to use when creating a sales lead from the Related Actions page in a call center case. When you establish tableset sharing, make sure that the sales business unit and the call center business unit prompt against the same set of customers.
Quality Unit	Enter the default Quality Management business unit to use when creating or relating a defect to a case. You can create a new defect or relate an existing defect. In either case, the system displays the business unit that you enter here on the page.
Order Capture Unit	Enter the default Order Capture business unit to use when entering an order related to a case. Note: If you use a lead qualification script to transfer to Order Capture from either the Support or HelpDesk case component, the business unit must be valid for your Order Capture application or you must select a default order capture business unit on this setup page.
Online Marketing Unit	Select the online marketing business unit that you want the system to use by default in the Dialog Business Unit field when a user selects the <i>Case Survey</i> related action to launch a customer survey from the Case page.

Business Unit - Options Page

Use the Business Unit - Options page (BUS_UNIT_RC2) to define business rules for a call center business unit.

Navigation:

Set Up CRM > Business Unit Related > Call Center Definition > Options

This example illustrates the fields and controls on the Business Unit - Options page (1 of 3).

Call Center Definition

Call Center BU: **Options** | Display Templates | Case Defaults

Business Unit: **HRH DU** | HR HelpDesk

Agent

Enable	Feature	Option	Notes
☒	Assign Person	Assign agent entering case	Automatically assign the case when it is saved
☒	Assign Provider Group	Assign based on Agent	Automatically assign the case when it is saved
☒	Call Center Manager	Jorge Menendez	Call center manager for the selected business unit.
☒	Max # of Notes in Web Service	5	Limit the number of notes in Web Service if you tend to have many notes in your cases
☐	ER Case Manager		Employee Relations Case Manager for the selected business unit.
☒	Product Prompt	All	Choose how you would like the product prompt to work
☒	Allow Multiple Resolutions		Allow an agent to select more than one solution to be marked as successful.
☒	Autoexecute Solution Search		Executes the Solution Search automatically when the 'Search' tab is clicked.
☒	Canceled to Open Case Status		Allow Agents to Reopen Cases that are Canceled.
☒	Closed to Open Case Status		Allow Agents to Reopen Cases that are Closed.
☐	Security Matrix		Generally used for Financial Services
☒	Percent of SLA for Red	95	Define the percentage of SLA Restore time when a Case will turn Red
☒	Percent of SLA for Yellow	50	Define the percentage of SLA Restore time when a Case will turn Yellow
☒	Close with Business Project		Allow Agent to Close Case with In Process Business Project
☒	Close with Pending Order		Allow Agent to Close Case with Open Service Order

This example illustrates the fields and controls on the Business Unit - Options page (2 of 3).

Call Center Definition

Case ID Before Save: ☐ Used to Display the Case ID Before Save.

Change Adhoc Solution Status to "Submitted for Review": ☐ Automatic update the Status of an Adhoc Solution when that Solution resolves the Case.

Solve Case from Outbound Notification: ☒ Allow Case to be solved from an Outbound Notification

Email Resolution Solution ID: ☒ 301333 Canned solution for resolving a case from an outbound email

Enable Case Match: ☒ Match Usage Allow agents to find and relate similar cases using the predefined match criteria for the Business Unit or Provider Group on the case.

Reason Interested: ☒ HR Representative Choose the reason to use when the Add Interested Party action is taken from the 360 degree view global cases node.

Incomplete Tasks Warning: ☐ Show warning while case closure with incomplete Tasks

Favorite Solutions for Agents: ☐ Allow agents to mark solutions as their favorite.

Case Note Edit Restriction: ☐ Allow specific users to edit the saved case note

Self-service

Enable	Feature	Option	Notes
☒	Assign Person	No automatic assignment	Automatically assign the case when it is saved
☒	Assign Provider Group	No automatic assignment	Automatically assign the case when it is saved
☒	Solution newly created period	30	How long the 'new' icon shows for solutions
☒	Allow Case to be Closed		Allow Self-service Users to Close Cases
☒	Allow Case to be Reopened		Allow Self-service Users to Reopen Cases that are Closed
☒	Grace Period (Days)	7	How long a self-service user can reopen the case. After that, a new case need to be created.
☒	Reason Interested	Employee	Choose the reason to use when the Notify Me action is taken from a Self Service Case or Known Issues.
☐	Suggested Solutions Count		Number of Solutions suggested to a self-service user while creating a case

This example illustrates the fields and controls on the Business Unit - Options page (3 of 3).

← | ⌚ | ♥

Q Search in Menu

🏠 | 🔔 | ⋮ | ⌛

Call Center Definition

☒ Case Age Defaults for Analytic

*Chart Time Selection Days

🔍

1-7 of 7

	Sequence Number	From	Through	Range	
1	1	0	2	0 - 2 Day(s)	—
2	2	3	14	3 - 14 Day(s)	—
3	3	15	30	15 - 30 Day(s)	—
4	4	31	90	31 - 90 Day(s)	—
5	5	91	120	91 - 120 Day(s)	—
6	6	121	999	121 - 999 Day(s)	—
7	7	1000	9999	1000 - 9999 Day(s)	—

Add

Modified 03/04/2013 3:07PM PST SAMPLE

Save

Return to Search

Previous tab

Next tab

Refresh

Add

Update/Display

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

Agent

Field or Control	Description
Assign Person	Select the option that you want the system to use to automatically assign new cases to individual agents. See Person Assignment .
Assign Provider Group	Select the option that you want the system to use to automatically assign provider groups to new cases. See Person Assignment .
Call Center Manager	Select your default call center manager. You can use the selection here to route workflow using AAF notifications. See “Understanding PeopleSoft CRM Workflow” (Automation and Configuration Tools).
Max # of Notes in Web Service	If you tend to have many notes in your cases, enter a number that limits the volume of notes that you want included in a web service. If you leave this field blank, the system includes all notes.

Field or Control	Description
ER Case Manager	Select your default ER case manager for the selected business unit. ER Case Manager will be able to access all the ER Cases for the particular BU irrespective of the individual assignment. See Understanding Employee Relations Case Management.
Product Prompt	Select how you want the product prompt to work. The options are: • <i>All</i> You can select a product from the primary products table. • <i>Installed</i> You can select from a list of products that are installed at a specific site. See “Defining Products” (PeopleSoft Product and Item Management).
Allow Multiple Resolutions	Select if you want to allow an agent to select more than one solution to be marked as <i>Successful</i> .
Autoexecute Solution Search	Select if you want the PeopleSoft search to automatically execute when the Search page is accessed.
Canceled to Open Case Status	Select to allow agents to reopen cases that are in a canceled status.
Closed to Open Case Status	Select to allow agents to reopen cases that are closed.
Bill for Cases	Select if you are using the billing functionality for support cases. Select the Details link to enter price by currency and rate type information. Note: This field appears only if you selected the Send Billing Transactions to Contracts and Calculate Price on Case check boxes on the Installation Options - Billing and Pricing Options page.

Field or Control	Description
Percent of SLA for Red (percent of service level agreement for red)	Enter a number to indicate the percentage of SLA (Service Level Agreement) restore time that needs to pass before the system turns the case to red. For example, enter 90 (enter a whole number, not a decimal amount) if you want a case to turn red when it has reached 90 percent of the SLA restore time. In addition, this calculation takes into account the time the case is on hold.
Percent of SLA for Yellow percent of Service Level Agreement for yellow)	Enter a number to indicate the percentage of SLA restore time that needs to pass before the system turns the case to yellow. The number you enter in this field must be lower than the red number or you will receive an error message. As such, a case should turn yellow before it turns red. These fields will accept numbers between 1 and 999. Do not enter decimal amounts.
Close with Business Project	Select to allow agents to close cases with business projects that are at the <i>In Process</i> status.
Close with Service Order	Select to allow agents to close cases that have an open service order.
Case ID Before Save	Select to generate a case ID when the agent first opens the case.
Change Adhoc Solution Status to "Submitted for Review"	Select to automatically update the status of an ad hoc solution to <i>Submitted for Review</i> when a solution resolves a case.
Solve Case from Outbound Notification	Select to allow cases of this business unit to be resolvable when outbound notifications are sent. This option is selected by default. When selected, the Send and Solve toolbar button appears on the Outbound Notification page if the initiating transaction is case. You can click this button for the system to perform these tasks: • Deliver the drafted notification to recipients. • Solve the associated case by attaching a predefined canned solution (the specified email resolution solution ID) to the case and setting the case status to the resolved case status as specified on the Case Defaults page. See “Sending Manual Notifications From CRM Transactions” (Automation and Configuration Tools).

Field or Control	Description
Email Resolution Solution ID	Select to specify a solution that attaches to cases when users click the Send and Solve button on the Outbound Notification page. Solutions meeting these criteria are available for selection: • Solutions are of type <i>Canned Solution</i>. • Solutions are active. • Solutions belong to the setID that is associated with the call center business unit. When the system resolves a case from an outbound notification, it attaches a solution to the case with a solution status of <i>Successful Resolution</i> and then sets the status of the case to the predefined resolved case status. As a result, the system also increases the usage count of the canned solution by one as well. Note: If you access the Outbound Notification page by clicking the Email button to email a solution and click the Send and Solve button, the selected solution is then used to attach to the related case as the successful resolution. The canned solution does not apply when a solution is already selected. This option is selected automatically if the Solve Case from Outbound Notification option is selected. Make sure to specify an email resolution solution; otherwise, an error message appears if you click the Send and Solve button but no canned solution is available to attach and resolve the case. In this case, the system sends the notification but it does not resolve the case.
Enable Match Case	Select this to enable case matching for this Business Unit. Case matching enables you to instruct the system to find cases that are similar to the case you are presently viewing. This provides a quick way to check if the issue from the current case you are viewing has already been reported in or is related to another case. Note: The rules for defining case matches are defined on the Match Detail page, and can be viewed using the Match Usage link on the Options page for Call Center Business Unit defaults.

Field or Control	Description
Match Usage	Click this link to view the match usage criteria that have been defined for this business unit and associated SetID on the Match Detail page.
Reason Interested	Specify the reason to be associated with the entry for interested party on a case when the Add Interested Party action is taken from the 360-Degree View global cases node.
Favorite Solutions for Agents	Select this to allow agents to mark solutions as favorite.
Case Note Edit Restriction	Select this checkbox to allow specific users (who have access to "Case Note Edit Access" role) to edit the saved case note.

Self-Service Options

Field or Control	Description
Assign Person	Select the option that you want the system to use to automatically assign self-service cases to individual agents. See Person Assignment .
Assign Provider Group	Select the option that you want the system to use to automatically assign provider groups to new cases. See “Understanding Provider Groups and Group Members” (Application Fundamentals).
Solution Newly Created Period	Specify how long (in days) the <i>new</i> icon should appear for solutions.
Allow Case to be Closed	Select to allow self-service application users to close cases.
Allow Case to be Reopened	Select to allow self-service application users to reopen cases that are closed.
Grace Period (Days)	Enter the number of days after a case has been closed during which self-service application users are permitted to reopen the case. This option is only allowed if you select the previous option—allowing a case to be reopened. If you allow cases to be reopened, the grace period will default to 7 days.

Field or Control	Description
Reason Interested	Specify the reason to be associated with the entry for interested party on a case when the Add Interested Party action is taken from the 360-Degree View global cases node.
Suggested Solutions Count	Select to specify suggested solutions count while creating a case. You can specify the solution count based on days or solutions created across dates.

Related Links

“Understanding TableSet Controls in PeopleSoft CRM” (Application Fundamentals)

Match Usage Page

Use the Match Usage page (RC_MATCH_SUMMARY) to view the case matching criteria defined for this business unit and associated SetID.

Navigation:

Click the Match Usage link on the Business unit - Options page.

This example illustrates the fields and controls on the Match Usage page.

Business Unit Match Summary

Call Center Business Unit Options

Match Usage

Business Unit HRH DU Description HR HelpDesk

Business Unit Personalize | Find | 1-2 of 2 First Last

Case Match ID	Description	Relationship Type
HRDUPMATCH	HRHD Duplicate Match Rule	Duplicate
HRGLOBLMAT	HRHD Global Match Rule	Global

Provider Group

No match definition is found for Provider Group

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

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

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

See [Understanding Call Center Prompt Tables](#).

Business Unit - Display Templates Page

Use the Business Unit - Display Templates page (BUS_UNIT_RC_RDT) to associate display template families and display templates with the business unit.

Navigation:

Set Up CRM > Business Unit Related > Call Center Definition > Display Templates

This example illustrates the fields and controls on the Display Templates page.

*Template Family	*Display Template ID
CRM_HE	CRM_HE
CRM_HE	CRM_HE_KNOWN_ISSUES
CRM_HE	CRM_HE_SUPPORT

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

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

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

Case Defaults Page

Use the Case Defaults page (BUS_UNIT_RC_DEF) to set up defaults for all call center applications.

Navigation:

Set Up CRM > Business Unit Related > Call Center Definition > Case Defaults

This example illustrates the fields and controls on the Case Defaults page (1 of 2).

Call Center BU | Options | Display Templates | **Case Defaults**

Business Unit US300 CRMCO Hardware/Software

Case Defaults Find | View All First 1 of 8 Last

*Template Family RC_HELPDESK HelpDesk Family

*Component Name RC_CASE Case

All Call Centers

New Case Status Open - New Case

Resolved Case Status Closed - Resolved

Reopened Case Status Case Reopened

Duplicate Case Status Canceled - Duplicate

Case Type Technical Question

Case Subtype

Case Priority Low

Case Impact Significant

Urgency

Case Severity Reproducible

Source Direct Call

Source Web Service 3rd Party

Source ERMS Email

Source HCM

Product Group

This example illustrates the fields and controls on the Case Defaults page (2 of 2).

CTD Defaults

Category Computer Hardware

Specialty Type Desktop Computer

Detail Floppy Drive

Modified 10/31/2008 10:53AM PDT SAMPLE

* Required Field

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

Case Defaults

<i>Field or Control</i>	<i>Description</i>
Template Family	Select the display template family that you want to use for this business unit. The system shows all the existing display template families that are defined in the system.
Call Center Component	Select the component that you want to associate with the display template family that is displayed in the previous field. The system displays the components that are defined for the selected display template family. You can set up different defaults for different components on the same template, and you can set up different default values for different templates that use the same business unit. When you select a component, the system may display a different set of fields, as not all default fields apply to each call center component.

All Call Centers

<i>Field or Control</i>	<i>Description</i>
New Case Status	Select the status that you want the system to use when an agent opens a new case. Note: Although most defaults are optional, the New Case Status default is required for the component that is used to report new self-service cases. Without a default value, the system cannot save the case. Also, because Case Status is a required field for a case, an agent reporting a case through a self-service application cannot set the case status.
Resolved Case Status	Select the value that you want the system to use when an agent identifies a successful solution and resolves the case. Both agents and self-service application users can resolve cases. Agents resolve cases by setting a solution status to <i>Successful Resolution</i>. Self-service application users resolve cases by answering <i>Yes</i> when asked whether a particular solution resolved their problem. The default can be different for a self-service user than it is for an agent.

Field or Control	Description
Reopened Case Status	If you selected the Allow Case to be Reopened check box on the Business Unit - Options page, select the status that you want the system to use when the self-service application user reopens a case. If you do not enter a status here, then, when an agent or self-service user reopens a case, the status will not change. The result could be cases closing without a successful resolution—a condition that the system does not normally allow.
Duplicate Case Status	If you relate one case to another, and the associated relationship type definition has the Set status of child case using duplicate case status from the Business Unit Defaults check box selected, then the child case status will be automatically set to the value specified in this field. Note: If this field has no value, then the child case status will not be updated when it is related to another case, even if the associated relationship type definition has the Set status of child case using duplicate case status from the Business Unit Defaults option checked.
Case Type	Select the default case type for a new case.
Case Subtype	Select the default case subtype for a new case.
Case Priority	Select the default case priority for a new case.
Case Impact	Select the default case impact for a new case.
Urgency	Select the default case urgency for a new case.
Case Severity	Select the default case severity for a new case.
Source	Select the default source for the case. This field enables you to tell which cases were entered by way of self-service applications or by agents.
Source Web Service	Select the default source for a case that is created through a web service.

<i>Field or Control</i>	<i>Description</i>
Source ERMS	Select the default source for a case that is created through the PeopleSoft CRM ERMS system. See “Understanding ERMS Setup” (PeopleSoft Multichannel Applications).
Source HCM	Select the default source value to populate for cases that are automatically created when personal or job data updates have occurred in the integrated HCM system. Use this field when the automatic case creation feature is enabled.
Product Group	Select the default product group for a new case. When an agent or user selects a Product Group on a case, the system filters the values for the product and installed product to only display the products and installed products contained within the specified product group.

Category/Type/Details (CTD) Defaults

<i>Field or Control</i>	<i>Description</i>
Category	Select the default case category for a new case.
Specialty Type	Select the default case specialty type for a new case.
Detail	Select the default case detail for a new case.

Defaults for Self-Service

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

<i>Field or Control</i>	<i>Description</i>
Assign to Provider Group	Select the provider group that you want the system to use when a user opens a case for the self-service business unit.
Note Type	Select the note type that you want the system to use when a user opens a case for the self-service business unit.

Field or Control	Description
New Case Status	Select the case status that you want the system to use when a user opens a new case for the self-service business unit.
Resolved Case Status	Select the status that you want the system to use when a user identifies a successful solution a case for the self-service business unit.
Closed Case Status	Select the status that you want the system to use when a user closes a case for the self-service business unit.
Reopened Case Status	Select the status that you want the system to use when a user reopens a case for the self-service business unit. If you do not enter a status here, then the status will not change when the self-service user reopens a case. The result could be cases being closed without a successful resolution—a condition that the system does not normally allow.
Contact Me Provider Group	Select the provider group that you want the system to use when a user clicks the Contact Me button on a case for the self-service business unit.

Related Links

[Understanding Call Center Prompt Tables](#)

Defining Display Template General Options for PeopleSoft Call Center

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

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

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

Page Name	Definition Name	Usage
Display Template Page	RDT_TMPL_PAGE	Use this page as an entry point to control the appearance and behavior of the specified component.

Related Links

“Understanding Display Templates” (Automation and Configuration Tools)

Display Template Page

Use the Display Template page (RDT_TMPL_PAGE) to use this page as an entry point to control the appearance and behavior of the specified component.

Navigation:

Set Up CRM > Common Definitions > Component Configuration > Display Templates > Display Template Details

This example illustrates the fields and controls on the Display Template page (1 of 2).

Display Template

Template ID RC_SUPPORT	Family Support Case Family
Description Support	Component RC_CASE

Pages

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

This example illustrates the fields and controls on the Display Template page (2 of 2).

General Options		
Option	Value	Comments
Licensed Product Code	Support	The Licensed Product that this template applies to.
Licensed Product Description	CRM for Support	Type in a Description. This will be shown in User Preferences.
360 Version	Customer	Choose the 360 type to use for this template.
Application Set Extension	Call Center Classes	This contains functions to handle additional business logic to be performed when the user clicks on selected tabs, hyperlinks, etc. Do not change this value unless you are familiar with this Application Class Extension.
Search Definition Name	CALLCENTER	Select the Solution Advisor Search Definition Name to use for this template.
BO Search Adapter Name	RC Support	Choose the Adapter to use for this template on this component
Email Template for Case Notes	SYS:RC: Send Selected Notes	Choose the E-mail Template that you want to use to E-mail Case Notes.
Email Template for Solutions	SYS:Send Selected Resolution	Choose the E-mail Template that you want to use to E-mail Solutions.
Portal Name	EMPLOYEE	Select the Portal to use for Transferring using a Content Reference.
Portal Object Name	CR_RC_CASE_GBL_CREATE	Select the Content Reference to use for transfers
Action Group ID	Support Related Actions	Select the Action Link Group to use for this template. This group is the superset of all action links that a user will be able to use for this template.
Task Template	Support	Select the Application Usage to be used for this template.
Toolbar	Support Case Toolbar	Select the Toolbar definition to use for this template.

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

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

Pages

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

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

Field or Control	Description
Add Mode Default	Select to show the corresponding page by default when you create a transaction for the component. Selecting this check box is optional and you can select only one page as the default. If you don't identify a default page, the system displays the page that is specified for the component in Application Designer. If users access the component and they don't have permission to access the default page, the system displays the first page in the component that the user has permission to access.
Update Mode Default	Select to show the corresponding page by default when you open an existing transaction for the component. Selecting this check box is optional. You can select only one page as the default. The display logic that is used for the add mode applies to the update mode as well.

General Options

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

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

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

Field or Control	Description
Licensed Product Code	Select the licensed product that this display template applies to.
Licensed Product Definition	Enter a description of the licensed product identified in the previous field.
360 Degree Version	Select the type of <i>360-Degree View</i> that you want to use for this template. Options are <i>Customer</i>, <i>Constituent</i>, <i>HRHD Worker</i>, and <i>Worker</i>. See “Understanding 360-Degree View Setup” (Application Fundamentals).

Field or Control	Description
Application Set Extension	This option contains functions to handle additional business logic to be performed when the user clicks selected tabs, links, and other items on the page. Do not change this value unless you are familiar with this application class extension.
Search Definition Name	Select the Solution Advisor Search Definition Name that you want to use for this template.
BO Search Adapter Name (business object search adapter name)	Select the adapter to use for this template on this component. The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the sub-pages of the component upon which these fields appear. See “Understanding BO Search and Quick Create Setup” (Business Object Management).
Email Template for Case Notes	Select the default correspondence template that you want to use to email case notes to customers or employees. See “Understanding Correspondence Generation” (Automation and Configuration Tools).
Email Template for Solutions	Select the default correspondence template that you want to use to email solutions to customers or employees. See “Understanding Correspondence Generation” (Automation and Configuration Tools).
Portal Name	Select the portal that you want the system to use for transferring information when you are using a content reference. See Understanding Link Setup.
Portal Object Name	Select the content reference that you want the system to use for transfers. See Understanding Link Setup.

Field or Control	Description
Action Group ID	Select the action link group that you want the system to use for this template. This group is the superset of all action links that a user will be able to use for this template. See Understanding Link Setup .
Task Template	Select the application usage to filter which task templates are available on the case for that display template.
Toolbar	Select which toolbar should appear on the case for that display template.

Managing Policies Using Case Display Template Actions

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

Page Used to Manage Policies Using Case Display Template Actions

Page Name	Definition Name	Usage
Manage Policies by Case Display Template Action Page	RC_RDT_PLCY_SRCH	View AAF policies that are using the Case Display Template action.

Manage Policies by Case Display Template Action Page

Use the Manage Policies by Case Display Template Action page (RC_RDT_PLCY_SRCH) to view AAF policies that are using the Case Display Template action.

Navigation:

Set Up CRM > Common Definitions > Component Configuration > Display Templates > Case Display Template Policies

This example illustrates the fields and controls on the Manage Policies by Case Display Template Action page.

Manage Policies by Case Display Template Action

▼ Search

Use Saved Search

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

*SetID =

SHARE

SHARE

Policy Name

begins with

Status

=

Trigger Point

=

Context

=

Template Family

=

CRM_HE

Higher Education Family

Display Template ID

=

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

Build Policy

SetID = SHARE AND Template Family = Higher Education Family

Policies

Personalize | Find |

First 1-3 of 3 Last

Policy Name	SetID	Trigger Point Name	Display Template Family	Display Template
Higher Education Case	SHARE	When a Support Case is Presented	Higher Education Family	Higher Education
Higher Education IT Case	SHARE	When a Support Case is Presented	Higher Education Family	Higher Education - IT
Higher Education Support Case	SHARE	When a Support Case is Presented	Higher Education Family	Higher Education - Support

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

Setting Up Call Center Prompt Tables

Understanding Call Center Prompt Tables

This topic discusses:

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

Call Center Prompt Tables

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

Prompt Tables for All Cases

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

- **Case Status** (required)
- **Case Type**
- **Impact**
- **Priority**
- **Urgency**
- **Severity**
- **Source**
- **Category, Specialty Type, and Details**
- **Problem Type**
- **Quick Code**

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

Problem types are defined by the product for which a case is being created. Use problem types to associate products with the competencies that one needs to resolve a problem. Because **Problem Type** is a child of **Product**, the **Problem Type** field on the Case page derives its values from **Product**. The

Product must be set up before **Problem Type**. **Competencies** for **Problem Type** are not restricted, however.

See “Understanding Products in PeopleSoft CRM” (PeopleSoft Product and Item Management).

Problem Codes for PeopleSoft Support Material Returns

This section is specific to PeopleSoft Support.

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

See [Setting Up Problem Codes for Material Returns](#).

Reason Codes

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

- Reasons why a person has been associated with a case as an interested party.
- Reasons why a self-service user is closing a case.
- Reasons why a self-service user is reopening a case.
- Reasons for billing adjustments. (Used with billing contract integration.)

See [Setting Up Reason Codes](#).

Case Relationship Types

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

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

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

See [Setting Up Case Relationship Types and Labels](#).

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

Suppose that a software bug is causing problems. Again, many people are reporting the problem, but this time each individual must apply a software patch. Create a common case to track the problem and create child cases for each individual reporting the problem. Based on this relationship, you can track

the effect of the problem across your organization. This common-case parent-child relationship differs from the web server global case because you do not want to close the child cases when the common case is closed.

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

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

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

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

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

Related Links

[Understanding Case Management](#)

[Understanding Processing a Case](#)

[Understanding Material Return Processing](#)

[Understanding Change Request Management](#)

[Understanding Self-Service Transactions](#)

“Integrating with PeopleSoft Financial Management Services” (PeopleSoft Integrated FieldService)

“Integrating with PeopleSoft Human Capital Management” (PeopleSoft Integrated FieldService)

“Integrating with PeopleSoft SCM” (PeopleSoft Integrated FieldService)

Delivered Values in Call Center Prompt Tables

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

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

Relationship Types

This table lists the delivered relationship types:

<i>Type</i>	<i>Hierarchical</i>	<i>Short Name</i>	<i>Labels</i>
COMMO	Yes	Common	Parent, Child

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

Related Links

“Understanding AAF” (Automation and Configuration Tools)

Common Elements Used to Set Up Call Center Prompt Tables

Field or Control	Description
SetID	Except for quick codes, which are associated with business units, all of the prompt tables described in this documentation are associated with setIDs. This association enables you to set up different sets of values for different call center business units. If you're setting up one set of values for all of your call centers, use the same setID for all of the values. If you're setting up different sets of values for different call centers, enter the appropriate setID for each value.
Self-Service	Select this check box to inform the system as to which values or fields self-service application users can select when creating new cases. Select this check box to allow self-service application users to select priorities of <i>Low</i> and <i>Standard</i>, but not <i>High</i>. This check box does not affect the self-service application users' ability to see the value when viewing an existing case; it only affects their ability to select the value when creating a new case. This check box is relevant only for fields that self-service application users can edit.
Short Name	Enter a short name that describes the value to users of the Case page. Note: Although you can enter up to 20 characters, names longer than 15 characters might be truncated in the drop-down list boxes on the Case page.

Field or Control	Description
Self-Service Description	Enter a description regardless of whether the Self-Service check box is selected. This entry describes the value to self-service application users. Even if users cannot select a value (the behavior controlled by the check box), they still may be able to view it. If you don't enter a description, the system copies the short description to this field when you save the page. If the value appears on any of the self-service pages, the self-service description appears instead of the regular short description.
Long Description	Enter a long name, up to 50 characters, that describes the value.
Effective Date	Enter the effective date of the value. Most prompt table values are not effective-dated; only quick codes and reason codes have effective dates.
Status	Select a status to determine whether an effective-dated item (a quick code or a reason code) is active or inactive as of the associated effective date.

Setting Up Basic Prompt Tables for Cases

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

This topic lists prerequisites and discusses how to set up basic prompt tables for cases.

Pages Used to Set Up Prompt Tables for All Cases

Page Name	Definition Name	Usage
<u>Case Status Page</u>	RC_STATUS	Set up case status values.
<u>Case Type Page</u>	RC_CASETYPE	Set up case type values.
<u>Priority Page</u>	RC_PRIORITY	Set up case priority values.
<u>Urgency Page</u>	RC_URGENCY	Set up case urgency values.

Page Name	Definition Name	Usage
<u>Severity Page</u>	RC_SEVERITY	Set up case severity values.
<u>Impact Page</u>	RC_IMPACT	Set up impact values.
<u>Source Page</u>	RC_SOURCE	Set up valid methods people can use to report cases. You can track cases that are created through self-service or cases that are initially created by your computer and telephony integration system.
<u>Problem Type Page</u>	RC_PROBTYPE	Set up problem types. Associate problem types to products and the competencies that one would need to resolve the particular problem.
<u>Category Page</u>	RC_CTD_CATEGORY	Set up case category values.
<u>Category Competencies Page</u>	RC_CTD_CAT_COMP	Set up case category competency values.
<u>Type Page</u>	RC_CTD_TYPE	Set up case specialty types.
<u>Type Competencies Page</u>	RC_CTD_TYPE_COMP	Set up case specialty type competencies.
<u>Detail Page</u>	RC_CTD_DETAIL	Set up case details.
<u>Detail Competencies Page</u>	RC_CTD_DETAIL_COMP	Set up case detail competencies.
<u>Combine Category/Type/Detail Page</u>	RC_CTD_COMBINE	Set up valid combinations of category, specialty type, and detail.
<u>Combine Category/Type/Detail: Competencies Page</u>	RC_CTD_COMP	View and edit competencies linked to the category, specialty type and detail associated with row of the grid from which the user clicked the Competencies button.
<u>Quick Code Page</u>	RC_QUICK_CODE	Set up quick code shortcuts that an agent can use to enter data automatically into various fields on the Case page.

Prerequisites

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

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

Quick codes may reference most of the other setup values discussed in this section.

- You must set up your products before you can set up problem types.
- If you want to use competencies in case assignment, establish competencies before you set up the Category, Specialty Type, Detail, and Problem Types pages.

Related Links

“Understanding Solutions” (PeopleSoft Services Foundation)

“Understanding Workers in CRM” (Business Object Management)

“Understanding Provider Groups and Group Members” (Application Fundamentals)

“Setting Up Competency Information in PeopleSoft CRM” (Application Fundamentals)

Case Status Page

Use the Case Status page (RC_STATUS) to set up case status values.

Navigation:

Set Up CRM > Product Related > Call Center > Case Status > Case Status

This example illustrates the fields and controls on the Case Status page.

Case Status

SetID CRM01

Description Appliance

Case Status

Personalize | Find |  

First 1-13 of 13 Last

*Case Status	*Category	*Short Name	Self-Service Description	Long Description		
CANC	Canceled	Case Canceled	Case is Canceled	Case Canceled		
CANDU	Canceled	Canceled - Duplicate	Case Canceled - Duplicate	Case Canceled - Duplicate		
CUST	Case is Open	Open - Awaiting User	Awaiting User Input	Open - Awaiting User		
DUP	Closed	Closed - Duplicate	Case Closed - Duplicate	Case Closed - Duplicate		
ENG	Case is Open	Open - Awaiting Eng	Open - Awaiting Engineering	Open - Awaiting Engineering		
FAIL	Closed	Closed - Failure	Case Closed - Failure	Case Closed - Failure		
HOLD	Case is on hold	On Hold	On Hold	On Hold		
OPEN	Case is Open	Open - New Case	New Case	Open - New Case		
RESOL	Closed	Closed - Resolved	Case is Resolved	Case Closed - Resolved		
RMA	Case is Open	Open - RMA	Open - RMA	Open - RMA		
ROPEN	Case is Open	Case Reopened	Reopened Case	Case Reopened		
RSRCH	Case is Open	Open - Research	Agent Researching Case	Open - Research		
SRVOD	Case is Open	Open - Service Order	Open - Service Order	Open - Service Order		

* Required Field

Field or Control	Description
Category	Select a case category value for each case status. This value drives many of your call center metrics. Because the actual status values vary by implementation, certain system processing is based on the category field rather than the actual case status. All statuses fall into one of these categories: <i>Open:</i> Case needs to be resolved. <i>Closed:</i> Case is resolved and no further work is necessary. <i>Canceled:</i> Case is not resolved, but there is no longer any need to resolve the case. <i>On-Hold:</i> Case is on-hold, and the case needs to be resolved.
Billable	Select if you bill for support and integrate your CRM data with a PeopleSoft or third-party billing system.

Related Links

[Delivered Values in Call Center Prompt Tables](#)

[Case Closure](#)

Case Type Page

Use the Case Type page (RC_CASETYPE) to set up case type values.

Navigation:

Set Up CRM > Product Related > Call Center > Case Type > Case Type

This example illustrates the fields and controls on the Case Type page.

Case Type | ESI Options

SetID CRM02 | Description Hardware Software

Case Type Find | View All First 1 of 13 Last

*Case Type ADMIN

☒ Self-Service

Self-Service Description Administrative Question

Long Description Administrative Question

*Short Name Administrative Quest

Case Subtypes Personalize | Find | 1-3 of 3 First Last

Case Subtype	Self-Service	*Short Name	Self-Service Description	Long Description		
ADDRE	☒	Billing Address	GBI Billing Address	Billing Address	+	-
PERSO	☒	Update Pers Profile	Update My Profile	Update Customer Profile	+	-
POLIC	☒	Policies	Policies	Policies	+	-

* Required Field

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

Field or Control	Description
VAT Defaults	Click this link to access the VAT Defaults Setup page. This is a common page that is used to set up value-added tax (VAT) defaults for all PeopleSoft applications that process VAT transactions. Use this page to define VAT defaults for service groups according to VAT registration country and state. The system displays VAT defaults and Service VAT Treatment defaults only when the integration to PeopleSoft Transaction Billing Processor is installed.
Service VAT Treatment Defaults	Click this link to access the Service VAT Treatment Drivers Setup page. This common page is used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for service groups on this page for a supplier's (seller's) location country and state.
Case Subtypes	Use the fields in this section to enter descriptions of the case subtype that you want to associate with the case type that is described in the Case Type field.

See the product documentation for *PeopleSoft FSCM: Global Options and Reports*.

Priority Page

Use the Priority page (RC_PRIORITY) to set up case priority values.

Navigation:

Set Up CRM > Product Related > Call Center > Case Priority > Case Priority

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

Priority

SetID PSUNV
Description PeopleSoft University

Personalize | Find |
First 1-4 of 4 Last

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

* Required Field

Field or Control	Description
Category	Select the category that you want the system to associate with the entry in the Priority field. All priority values are associated with a priority category. Values include <i>High</i> , <i>Medium</i> , and <i>Low</i> . The association between a priority and a priority category enables the display of the High Priority Problem Reports chart to help identify high-priority cases.
Self-Service Description	Enter the descriptions of the priorities as you want them to appear on the self-service page of your call center application.

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

Urgency Page

Use the Urgency page (RC_URGENCY) to set up case urgency values.

Navigation:

Set Up CRM > Product Related > Call Center > Case Urgency > Case Urgency

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

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

* Required Field

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

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

Severity Page

Use the Severity page (RC_SEVERITY) to set up case severity values.

Navigation:

Set Up CRM > Product Related > Call Center > Severity > Severity

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

Severity

SetID PSUNV **Description** PeopleSoft University

Severity					Personalize	Find	First	1-4 of 4	Last
*Severity	Self-Service	*Short Name	Self-Service Description	Long Description					
INTER	☒	Intermittent	Intermittent	Intermittent					
ONET1	☒	Onetime Occurrence	Onetime Occurrence	Onetime Occurrence					
RECUR	☒	Recurring	Recurring	Recurring					
REPRO	☒	Reproducible	Reproducible	Reproducible					

* Required Field

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

Impact Page

Use the Impact page (RC_IMPACT) to set up impact values.

Navigation:

Set Up CRM > Product Related > Call Center > Case Impact > Case Impact

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

Impact

SetID PSUNV **Description** PeopleSoft University

Impact				Personalize	Find	First	1-4 of 4	Last
*Impact	*Short Name	Self-Service Description	Long Description					
MAJOR	Major	Major	Major					
MINOR	Minor	Minor	Minor					
SIGNI	Significant	Significant	Significant					
TRIVI	Trivial	Trivial	Trivial					

* Required Field

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

Source Page

Use the Source page (RC_SOURCE) to set up valid methods people can use to report cases.

You can track cases that are created through self-service or cases that are initially created by your computer and telephony integration system.

Navigation:

Set Up CRM > Product Related > Call Center > Source > Source

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

Source

SetID PSUNV **Description** PeopleSoft University

Sources Personalize | Find | First 1-9 of 9 Last

*Source	*Short Name	Long Description		
CTI	CTI	CTI	+	-
EIP	3rd Party	3rd Party	+	-
EM	Enterprise Mgr	Enterprise Manager	+	-
EMAIL	Email	Email	+	-
FAX	Fax	Fax	+	-
HCM	HCM HR HelpDesk	HCM HR HelpDesk	+	-
PHONE	Direct Call	Direct Call	+	-
WEB	Self-Service	Self-Service	+	-
WS	Web Service	Web Service	+	-

* Required Field

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

Problem Type Page

Use the Problem Type page (RC_PROBTYPE) to set up problem types.

Associate problem types to products and the competencies that one would need to resolve the particular problem.

Navigation:

Set Up CRM > Product Related > Call Center > Problem Type in Call Center > Problem Type in Call Center

This example illustrates the fields and controls on the Problem Type page.

Problem Type

SetID PSUNV Product BUS02 E-Business Fundamentals

Problem Types 1-5 of 5

Bookmark issue

Missing Chapter

Error on page

Cannot install

Cannot save test

Create a New Type

Problem Type

Find | View All First 1 of 5 Last

*Problem Type BOOK

*Short Name Bookmark issue

Self-Service Description Cannot create bookmark

Long Description Cannot create bookmark

Problem Type Competency Information

*Description	*Minimum Level	Weight
		N / A

Delete

Self-Service

* Required Field

Problem Type

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

Problem Type Competency Information

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

Category Page

Use the Category page (RC_CTD_CATEGORY) to set up case category values.

Navigation:

Set Up CRM > Product Related > Call Center > Category/Type/Detail > Category

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

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

SetID PSUNV Description PeopleSoft University

Categories Personalize | Find | First 1-10 of 10 Last

*Category	Self-Service	*Short Name	Self-Service Description	Long Description		
ACAD	☒	Academic Affairs	Academic Affairs	Academic Affairs	+	-
ACTY	☒	Activities	Activities	Activities	+	-
ADMN	☒	Admissions	Admissions	Admissions	+	-
ALUM	☒	Alumni Relations	Alumni Relations	Alumni Relations	+	-
ENROL	☒	Enrollment	Enrollment	Enrollment	+	-
FINAN	☒	Financial Aid	Financial Aid	Financial Aid	+	-
GRAD	☒	Graduate Programs	Graduate Programs	Graduate Programs	+	-
JUDGE	☒	Judicial Affairs	Judicial Affairs	Judicial Affairs	+	-
RLIFE	☒	Residential Life	Residential Life	Residential Life	+	-
TECH	☒	Technical Support	Technical Support	Technical Support	+	-

* Required Field

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

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

Category Competencies Page

Use the Category Competencies page (RC_CTD_CAT_COMP) to set up case category competency values.

Navigation:

Set Up CRM > Product Related > Call Center > Category/Type/Detail > Category Competencies

This example illustrates the fields and controls on the Category Competencies page.

Category Competencies page screenshot showing fields and controls. The page displays a table of Category Competencies for the category 'Residential Life'. The table includes columns for Description, Minimum Level, and Weight. The competencies listed are ADA Awareness, Ability to listen & respond, and Accountability for decisions, all with a Minimum Level of 3-Good and a Weight of 2 or 3. Navigation links (Find, View All, First, 9 of 10, Last) and a legend (* Required Field) are also visible.

Category Competency Information

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

Type Page

Use the Type page (RC_CTD_TYPE) to set up case specialty types.

Navigation:

Set Up CRM > Product Related > Call Center > Category/Type/Detail > Type.

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

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

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

SetID PSUNV Description PeopleSoft University

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

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

* Required Field

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

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

Type Competencies Page

Use the Type Competencies page (RC_CTD_TYPE_COMP) to set up case specialty type competencies.

Navigation:

Set Up CRM > Product Related > Call Center > Category/Type/Detail > Type Competencies.

This example illustrates the fields and controls on the Type Competencies page.

CategoryCategory CompetenciesTypeType CompetenciesDetailDetail Competencies

SetID PSUNVDescription PeopleSoft University

Specialty TypeFind | View AllFirst4 of 46Last

Specialty Type Description

Specialty Type Admissions

Specialty Type CompetenciesPersonalize | Find | View All |1-3 of 3Last

*Description	*Minimum Level	Weight		
Ability to transfer knowledge	3-Good	3	+	-
Administration	3-Good	4	+	-
Admissions	5-Expert	5 - Most Important	+	-

* Required Field

Specialty Type Competency Information

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

Detail Page

Use the Detail page (RC_CTD_DETAIL) to set up case details.

Navigation:

Set Up CRM > Product Related > Call Center > Category/Type/Detail > Detail.

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

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

SetID PSUNV Description PeopleSoft University

Details Personalize | Find | | First 1-50 of 100 Last

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

* Required Field

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

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

Detail Competencies Page

Use the Detail Competencies page (RC_CTD_DETAIL_COMP) to set up case detail competencies.

Navigation:

Set Up CRM > Product Related > Call Center > Category/Type/Detail > Detail Competencies.

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

SetID PSUNV Description PeopleSoft University

Details Find | View All First 5 of 100 Last

Detail Description

Detail Advisor

Detail Competencies Personalize | Find | View All | 1-3 of 3 Last

*Description	*Minimum Level	Weight
Academic Affairs	4-Very Good	5 - Most Important
Communication Skills	3-Good	4
Administration	3-Good	4

* Required Field

Detail Competency Information

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

Combine Category/Type/Detail Page

Use the Combine Category/Type/Detail page (RC_CTD_COMBINE) to set up valid combinations of category, specialty type, and detail.

Navigation:

Set Up CRM > Product Related > Call Center > Combine Category/Type/Detail > Combine Category/Type/Detail.

This example illustrates the fields and controls on the Combine Category/Type/Detail page.

Combine Category/Type/Detail

Save

Edit Category

Edit Type

Edit Detail

Enter or select the criteria you want to appear in the list of Category/Type/Detail combinations and click Search.

Search

Use Saved Search

*SetID

=

PSUNV

PeopleSoft University

Category

=

RLIFE

Residential Life

Specialty Type

=

Detail

=

Status

=

Active

Start Date

>=

End Date

<=

Search

Clear

Save Search Criteria

Delete Saved Search

Personalize Search

Category/Type/Detail Result

Personalize

Find

First

1-7 of 7

Last

Select	Category	Specialty Type	Detail	Start Date	End Date	Status		
☐	Residential Life	Health Care	Health Center	09/23/2008		Active	+	-
☐	Residential Life	Housing	Dormitory	09/23/2008		Active	+	-
☐	Residential Life	Housing	Off-Campus Housing	09/23/2008		Active	+	-
☐	Residential Life	Housing	Wait List	09/23/2008		Active	+	-
☐	Residential Life	Other	Campus ID Cards	09/23/2008		Active	+	-
☐	Residential Life	Parking	Parking Issues	09/23/2008		Active	+	-
☐	Residential Life	Parking	Parking Permit	09/23/2008		Active	+	-

☐ Check All / Clear All

L

Clone

Update Start Date

Inactivate

Re-activate

Delete

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

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

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

Search

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

Category/Type/Detail Result

Field or Control	Description
Category Description	Select the category for which you wish to define valid specialty types and details
Specialty Type	Select a specialty type that you wish to make available for the specified category value.
Detail	Select a detail that you wish to make available for the specified category and specialty type values.
Start Date	Enter the start date on which the specified category, specialty type and detail value combination will become valid.
End Date	The date after which the specified category, specialty type and detail value combination will no longer be valid. Cases created after this date will no longer be able to use this combination. Users do not enter end dates directly into the grid: end dates are displayed after a user selects one or more rows and clicks the Inactivate button.
Status	Shows the status of a particular combination defined on a row in the grid. Users do not enter values for this field: the status value displayed is based on the start and end dates in effect for that row. Rows with a start date greater than the current date are considered to be in <i>Pending</i> status, indicating that these combinations are not yet available on cases. Rows with an end date less than the current date are considered to be in <i>Inactive</i> status, and are not available to new cases. Rows whose start date precedes the current date and whose end date is either blank or greater than the current date are considered <i>Active</i> .
 (Competencies)	Click this button to view the competencies for the category, specialty type and detail listed on the row. Note: This button is only visible if there competencies exist for at least one of the category, specialty type or detail definitions listed in the search results.

Field or Control	Description
Clone	Click this button to clone the selected row(s) from the grid. You will be prompted to select which field(s) you do not wish to have cloned from the specified source row(s), since you must specify at least one value on the new row that is different from the source row. For example, users who wish to define multiple valid detail entries for a given category and specialty type may find it convenient to clone an existing row for that category and specialty type and simply add the desired detail value.
Update Start Date	Users may select multiple rows in the grid and update the valid start date for those rows by clicking this button and specifying the new desired start date.
Inactivate	Click this button to inactivate the selected row(s) from the grid. All selected rows will be given an end date equal to the current date, and the corresponding category, specialty type and detail combinations will no longer be available on cases opened after that date. Note that a combination cannot be inactivated if it is currently used by an open case, a case default, a quick code or an AAF policy action.
Reactivate	Click this button to reactivate the selected row(s) from the grid. All selected rows will be given a blank end date and a start date equal to the current date.
Delete	Use this button to delete the selected row(s) from the grid. A combination may not be deleted if it is currently used in an open case, a quick code, a business unit default, or an AAF policy action.

Combine Category/Type/Detail: Competencies Page

Use the Combine Category/Type/Detail: Competencies page (RC_CTD_COMP) to view and edit competencies linked to the category, specialty type and detail associated with row of the grid from which the user clicked the Competencies button.

Navigation:

Set Up CRM > Product Related > Call Center > Combine Category/Type/Detail > Combine Category/Type/Detail. Click the **Competencies** button for the desired **Category/Type/Detail Result** grid row.

This example illustrates the fields and controls on the Combine Category/Type/Detail: Competencies page.

Combine Category/Type/Detail

Competencies

SetID PSUNV **Description** PeopleSoft University

Category Residential Life

Category Competencies Information

*Description	*Minimum Level	Weight		
Ability to listen & respond	4-Very Good	N / A	+	-
ADA Awareness	2-Fair	N / A	+	-
Complaint Handling	3-Good	N / A	+	-

Specialty Type Housing

Type Competencies Information

*Description	*Minimum Level	Weight		
Conflict resolution	4-Very Good	N / A	+	-

Detail Dormitory

Detail Competencies Information

*Description	*Minimum Level	Weight		
Accountability for decisions	3-Good	N / A	+	-

OK Cancel Apply

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

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

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

Quick Code Page

Use the Quick Code page (RC_QUICK_CODE) to set up quick code shortcuts that an agent can use to enter data automatically into various fields on the Case page.

Navigation:

Set Up CRM > Product Related > Call Center > Quick Code > Quick Code

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

This example illustrates the fields and controls on the Quick Code page (1 of 3).

Quick Code

Quick Code 103 **Business Unit** HRH DU

Quick Code Description Find | View All First 1 of 1 Last

*Effective Date 08/19/2002

*Description Update Personal Info-PSFT *Status Active

Usage Count 1507 Last Used 03/06/2013

Problem Information

Field Label	Value	Overwrite
Problem Summary	Update personal information	☒
Description	Employee would like to update personal information.	☒

Case Information

Field Label	Value	Overwrite
Case Type	Administrative	☒
Case Subtype	Update Info	☒
Case Status	Open - Research	☒
Provider Group	General Inquiries	☒
Assigned To		☒
Product Group		☐

This example illustrates the fields and controls on the Quick Code page (2 of 3).

Product ID			☐
Product Description			
Problem Type			☐
Category	Employee Management		☒
Specialty Type	Personal Information		☒
Detail	Update Info		☒
Case Priority	Low		☒
Case Impact			☐
Source			☐
Urgency			☐
Case Severity	One Affected		☒
Error Code			☐
Error Message			
Suggested Action			
Field Label	Value	Overwrite	
Link Category	Human Resources	☒	
Version	(Invalid Value)		
Link Name	HRMS - Personal Data		

This example illustrates the fields and controls on the Quick Code page (3 of 3).

Solution

Field Label	Value	Overwrite
Keyword or Phrase		☒
Solution	3015	
Solution Summary	How to update your Personal Information	
Solution Status	Successful Resolution	

Display Template

Template Family	
Display Template ID	

Note

Note Summary	
Description	

Interested Parties

Personalize | Find | First 1 of 1 Last

Person ID	Name	Reason Code		
1			+	-

Audit History

Created	08/19/2002 6:53PM PDT	By	SAMPLE	Burt Lee
Modified	09/09/2009 12:40AM PDT	By	SAMPLE	Burt Lee

Field or Control	Description
Quick Code	This page displays a unique code that agents can use to populate multiple fields on the Case page automatically.
Business Unit	Displays the business unit of the call center that uses this quick code.

Quick Code Description

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

Field or Control	Description
Usage Count	Displays the number of times this quick code has been used to populate default values in cases. When you select a quick code to use in a case, at save time, the system increases the quick code usage count by 1 and updates the code's last used date to the current date. The same update applies when a case using this quick code is saved through component interface. The usage count provides the information needed to determine if a quick code is being utilized. You can then decide if you want to make modifications to increase usability or inactivate it accordingly. Note: If the quick code definition is updated using the Correct History mode, the usage count and last used values are not reset; however, if you add a new effective-dated row to the quick code definition, the system resets the usage count and the last used date of the new row to zero and null respectively.
Last Used	Displays the date this quick code was last used. When you select a quick code to use in a case, at save time, this field is updated to the current date.

Overwrite

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

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

Value on Case Page	Quick Code Value	Overwrite Check Box	After Quick Code is Selected	Explanation
Blank	Open - Engineering	Selected	Open - Engineering	Quick code overwrites blank field.
Blank	Open - Engineering	Cleared	Open - Engineering	Quick code overwrites blank field even though Overwrite check box has not been selected.

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

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

Problem Information

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

Field or Control	Description
Problem Summary	Enter the summary associated with this quick code.
Description	Enter the description associated with this quick code.

Case Information

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

Field or Control	Description
Case Type	Select the case type associated with this quick code.
Case Subtype	Select the case subtype associated with this quick code.
Case Status	Select the case status associated with this quick code.
Provider Group	Select the provider group associated with this quick code.
Assigned To	Select the agent to whom the case is to be assigned. If you've specified a provider group, you can select agents who are part of that group only.
Product ID	Select the product ID associated with this quick code.
Problem Type	Select the problem type associated with chosen Product ID of this quick code
Category	Select the category associated with this quick code.
Specialty Type	Select the specialty type associated with this quick code.
Detail	Select the detail associated with this quick code.
Case Priority	Select the priority to be assigned to a case.
Case Impact	Select the impact to be assigned to a case.
Source	Select the source to be assigned to a case.
Urgency	Select the urgency to be assigned to a case.
Case Severity	Select the severity to be assigned to a case.
Error Code	Select the error code to be assigned to a case.
Error Message	Select the error message to be assigned to a case.

Suggested Actions

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

Field or Control	Description
Link Category	Select the link category to be associated with a case.
Version	Select the link category's version to be assigned to a case.
Link Name	Select the link name to be associated with a case.

Solution

Field or Control	Description
Keyword or Phrase	Enter the keywords to be associated with a case. These keywords appear in the Search subtab on the Solutions page of the Case component, thus driving the search for solutions for the case.
Solution	Click to select a solution to be associated with this quick code. When this quick code is selected for a case, the chosen solution appears on the Attempted Solutions section on the Solutions page of the case. Only solutions that meet all these conditions are available for selection: - Solutions in the same setID as the quick code - Solutions that are active based on their start and end dates and the effective date of the quick code. Note: When you select a solution for a quick code, you must also select a status for the solution. An error message appears if only one of these field has a value but not both.
Solution Summary	Displays the summary text of the selected solution.

Field or Control	Description
Solution Status	Select the initial status for the solution to appear on the Solution page of the Case component. Values are: <i>Failed Resolution</i> <i>In Consideration</i> <i>Successful Resolution</i> <i>Waiting on Customer</i> <i>Withdrawn</i> Note: When you select a solution status, you must also select a solution to which the status applies. An error message appears if only one of these field has a value but not both.

See “Case - Solution Page, Service Order - Solution Page or Quality Management - Solutions Page” (PeopleSoft Services Foundation).

Display Template

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

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

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

Notes

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

Field or Control	Description
Summary	Enter the notes summary to be associated to the case.
Description	Enter the notes description to be associated to the case.

See “Understanding Notes and Attachments” (Application Fundamentals).

Interested Parties

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

Field or Control	Description
Interested Parties	Select the interested parties to be associated with a case.
Reason Code	Select the reason the interested party should be listed as an interested party on the case.

Setting Up Problem Codes for Material Returns

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

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

Page Used to Set Up Problem Codes

Page Name	Definition Name	Usage
Problem Codes Page	RF_PROBLEM_CD	Set up the problem codes used to identify reasons for material returns on the RMA form.

Related Links

[Understanding Material Return Processing](#)

Problem Codes Page

Use the Problem Codes page (RF_PROBLEM_CD) to set up the problem codes used to identify reasons for material returns on the RMA form.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Support Problem Code Setup > Support Problem Code Setup

This example illustrates the fields and controls on the Problem Codes page.

Problem Codes

SetID CRM01

Problem Codes

Personalize | Find | View All |

First 1-6 of 6 Last

*Problem Code	*Description	Short Description	
CUSTERR	Customer Error	CUSTERR	
DAMAGE	Item Defective	Defective	
OVERSTK	Return Over Stock Item	Overstock	
REJECT	Rejected Shipment	Rejected	
TRANS-DAMG	Damaged in Transit	Damaged	
WRONG	Wrong Item Shipped	Wrong Item	

Add Problem Code

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

See *PeopleSoft FSCM: Application Fundamentals*

Setting Up Reason Codes

This topic discusses how to set up reason codes.

Page Used to Set Up Reason Codes

Page Name	Definition Name	Usage
Reason Code Page	RB_REASON_CD	Create reason codes for various actions.

Reason Code Page

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

Use the Reason Code page (RB_REASON_CD) to create reason codes for various actions.

Navigation:

Set Up CRM > Common Definitions > Codes and Auto Numbering > Reason Codes > Reason Code

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

Reason Code

SetID PSUNVReason Code CASECLOSED

Reason Code Definition

Find | View AllFirst1 of 1Last

*Effective Date06/11/2008

StatusActive

*Reason TypeReason Closed

*DescriptionCase Resolved

Self-Service DescriptionCase Resolved

Audit History

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

Setting Up Case Relationship Types and Labels

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

Page Used to Set Up Case Relationship Types and Labels

Page Name	Definition Name	Usage
Case Relationship Type Page	RC_RELATION_TYPE	Set up types of case relationships and define the relationship labels that will appear on the Related Cases page.

Case Relationship Type Page

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

Use the Case Relationship Type page (RC_RELATION_TYPE) to set up types of case relationships and define the relationship labels that will appear on the Related Cases page.

Navigation:

Set Up CRM > Product Related > Call Center > Case Relationship Type > Case Relationship Type

100

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This example illustrates the fields and controls on the Case Relationship Type page.

Case Relationship Type

Relationship Type GLOBESetID CRM01

General

*Short NameGlobal

Long DescriptionGlobal

Relationship

☒ Hierarchical

Parent LabelParent

Child LabelChild

Equivalent Label

Behavior

☐ Set Parent As Global Case

☐ Set status of child case using duplicate case status from the Call Center Business Unit Defaults

Modified 03/02/2001 2:43PM PSTDVP1

* Required Field

Relationship

Field or Control	Description
Hierarchical	Select this check box if the relationship is hierarchical (a parent-child relationship). Clear this check box if the relationship is not hierarchical. Non-hierarchical relationships are also called equivalent relationships.
Parent Label and Child Label	If this is a hierarchical relationship, these fields control how the relationship is described on the Related Cases page. If you look at the child case, the Relationship field displays the child label; if you look at the parent case, the Relationship field displays the parent label. You can enter information into these fields only if you select the Hierarchical check box.

Field or Control	Description
Equivalent Label	If this is not a hierarchical relationship, this field controls how the relationship is described on the Related Cases page. If you look at either one of the related cases, the Relationship field displays the equivalent label. You can enter information into this field only if you clear the Hierarchical check box.

Behavior

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

Field or Control	Description
Set Parent as Global Case	When a case relationship is created, if the corresponding relationship type has this check box selected, then the Global Case check box will be automatically selected and updated on the parent case of the new relationship.
Set status of child case using Duplicate Case Status from the Business Unit Defaults	When a case relationship is created, if the relationship type has this check box selected, then the child case status will be automatically set to the Duplicate Case Status value specified in the Call Center Business Unit Defaults page. Note: If this check box is selected but no Duplicate Case Status value has been specified on the Call Center Business Unit Defaults page, no automatic status update will be made on the child case.

Example

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

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

In that grid, the **Type** field value is *Global* and the **Relationship** field value is *Ticket*.

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

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

Setting up Case Matching Criteria

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

Pages Used to Define Matching Criteria

Page Name	Definition Name	Usage
Match Detail Page	RC_MATCH_DETAIL	Specify the criteria to be used to match a case with other existing cases.
Match Usage Page	RC_MATCH_USAGE	Specify the business units and provider groups to which the match criteria should apply.

Match Detail Page

Use the Match Detail page (RC_MATCH_DETAIL) to specify the criteria to be used to match a case with other existing cases.

Navigation:

Set Up CRM > Product Related > Call Center > Case Match Definition > Match Detail

This example illustrates the fields and controls on the Match Detail page (1 of 2).

The screenshot displays the Match Detail page for the Match ID **HRDUPMATCH** with the Description **HRHD Duplicate Match Rule**. The page is divided into several sections:

- Case Filter Criteria:** Includes a checkbox for **Global Case** and a field for *** Includes Case Search from Past Period (Months)** set to **99**.
- Case Match Status:** A table with columns for ***SetID**, **Description**, ***Case Status**, and **Description**. It lists five status entries, each with a dropdown for ***SetID** (all set to HRU01), a description, a dropdown for ***Case Status**, and a final description. Each entry has plus and minus icons for adding or removing items.

*SetID	Description	*Case Status	Description
HRU01	HR Help Desk USA	Open-Chg Request	Open - Change Request
HRU01	HR Help Desk USA	Open-Case Escalated	Open- Case Escalated
HRU01	HR Help Desk USA	Open - Pending HR	Open - Pending HR
HRU01	HR Help Desk USA	Open - New	Open - New
HRU01	HR Help Desk USA	Open - Research	Open - Research
- Case Match Criteria:** Divided into two columns: **Customer** and **Employee**.
 - Customer:** Includes checkboxes for **Customer**, **Contact**, **Site**, and **Region**.
 - Employee:** Includes checkboxes for **Employee ID** (checked), **Department**, and **Location**.

This example illustrates the fields and controls on the Match Detail page (2 of 2).

Product ☐ Product ☐ Serial ☐ Asset Tag	Information ☐ Case Type ☐ Sub Type ☐ Category ☐ Specialty Type ☐ Detail ☐ Provider Group
Incident Location ☐ Address ☐ Intersection	
Keyword Search Minimum Score(%) 50 ☒ Enable Keyword Search	

Case Filter Criteria

<i>Field or Control</i>	<i>Description</i>
Global Case	Select this to restrict the match to include only cases whose Global Case check box has been selected.
Includes Case Search In Past Period (Months)	Specify the number of months from case creation date to current date that should be considered when matching cases. A maximum value of 99 is allowed.
Case Match Status grid	Indicate the SetID and case status to be used when the system looks for matching cases.

Case Match Criteria

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

Incident Location

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

Keyword Search

<i>Field or Control</i>	<i>Description</i>
Minimum Score (%)	The minimum score returned from the PeopleSoft Search to qualify a case as a match.

<i>Field or Control</i>	<i>Description</i>
Enable Keyword Search	Select to enable keyword search on case match. If this check box is selected, the system will search the case Summary and Case Detail field values from other cases to match the words in the Summary field of the case from which the search has been initiated. Note: If this check box is selected, only cases that exceed or equal the minimum score are considered. These results must also meet all the other case match criteria specified on this page.

Match Usage Page

Use the Match Usage page (RC_MATCH_USAGE) to specify the business units and provider groups to which the match criteria should apply.

Navigation:

Set Up CRM > Product Related > Call Center > Case Match Definition > Match Usage

This example illustrates the fields and controls on the Match Usage page.

The screenshot shows the 'Match Usage' page with the following details:

- Match ID:** HRDUPMATCH
- Description:** HRHD Duplicate Match Rule
- Business Unit Match Usage Table:**
 - Columns: *Business Unit, Description, *Relationship Type
 - Values: HRH DU, HR HelpDesk, Duplicate
- Provider Group Match Usage Table:**
 - Columns: *Provider Group SetID, SetID Description, *Provider Group, *Relationship Type
 - Fields are currently empty.

Business Unit Match Coverage

<i>Field or Control</i>	<i>Description</i>
Business Unit	Specify the business unit for which this set of matching criteria (defined on the Match Definition page) should apply.
Relationship Type	Select the relationship type that should be made available for the selected business unit when presenting case matches.

Provider Group Match Coverage

<i>Field or Control</i>	<i>Description</i>
Provider Group SetID	Specify the SetID of the associated provider group for which this set of matching criteria (defined on the Match Definition page) should apply.
Provider Group Name	Specify the provider group for which this set of matching criteria (defined on the Match Definition page) should apply.
Relationship Type	Select the relationship type that should be made available for the selected provider group when presenting case matches. See Setting Up Case Relationship Types and Labels.

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

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

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

Setting Up RMA Processing

Understanding RMA in PeopleSoft Support

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

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

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

Activating the Required Service Operations

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

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

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

See the product documentation for *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Defining Items

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

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

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

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

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

Related Links

“Understanding Item Definition in PeopleSoft CRM” (PeopleSoft Product and Item Management)

Defining Defaults and Procurement Options for Requisition Processing

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

See *PeopleSoft FSCM: Purchasing*

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

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

See *PeopleSoft FSCM: Inventory*

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

See the product documentation for *PeopleSoft FSCM: Application Fundamentals*.

Defining Valid Requisition Requester IDs

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

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

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

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

See the product documentation for *PeopleSoft FSCM: Application Fundamentals* and *PeopleSoft FSCM: Purchasing*.

Setting Up Links to PeopleSoft Purchasing and PeopleSoft Inventory

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

See the product documentation for *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Synchronizing Problem Codes and Reason Codes

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

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

See the product documentation for *PeopleSoft FSCM: Application Fundamentals*.

Related Links

[Understanding Call Center Prompt Tables](#)

Viewing RMA Statuses

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

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

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

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

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

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

See the product documentation for *PeopleSoft FSCM: Inventory*.

Setting Up Links and Related Actions

Understanding Link Setup

This topic discusses:

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

Basic Link Setup

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

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

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

1. Link group.

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

2. Link category.

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

3. Link definitions.

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

Link Setup for PeopleSoft HelpDesk for Human Resources Users

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

- Set up a node for each database server.

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

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

See *PeopleTools: Portal Technology*

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

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

Link Presentation on the Case Page

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

The group box displays:

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

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

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

Link Groups Delivered by the PeopleSoft System

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

Link Group ID	Description
GOV	Government
HDREL	HelpDesk Related Actions
HE	Higher Education Actions
HEIT	Higher Education IT Actions
HESPT	Higher Education Support
HITEC	Hi-Technology
HREBS	HR HelpDesk EBS
HRMS	HR HelpDesk
SPRT	Support Related Actions

Link Categories Delivered by the PeopleSoft

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

Link Category	Link Version	Action Flag	Long Description	Description
ACAD	9.1	Active	Academics	Academic
ADM	9.1	Active	Admissions	Admission
BENEF	8.0 SP1	Inactive	Benefits	Benefits
BENEF	8.3	Inactive	Benefits	Benefits
BENEF	8.8	Inactive	Benefits	Benefits
BENEF	8.9	Inactive	Benefits	Benefits
BENEF	9.0	Inactive	Benefits	Benefits
BENEF	9.1	Active	Benefits	Benefits

<i>Link Category</i>	<i>Link Version</i>	<i>Action Flag</i>	<i>Long Description</i>	<i>Description</i>
CR	9.1	Active	Contributor Relations	Contributor Relation
CS	9.1	Active	Campus Community	Campus Community
EBABS	12.1	Active	Absences	Absences
EBASN	12.1	Active	Assignment	Assignment
EBCMP	12.1	Active	Manage Benefits	Manage Benefits
EBHR	12.1	Active	Personal	Personal
EBMWK	12.1	Active	Maintain Worker	Maintain Worker
EBPAY	12.1	Active	Manage Payroll	Manage Payroll
EBPUK	12.1	Active	Tax and Statutory	Tax and Statutory
FIN	9.1	Active	Financials	Financial
HRMS	8.O SP1	Inactive	HRMS	Human Resources
HRMS	8.3	Inactive	HRMS	Human Resources
HRMS	8.8	Inactive	HRMS	Human Resources
HRMS	8.9	Inactive	HRMS	Human Resources
HRMS	9.0	Inactive	HRMS	Human Resources
HRMS	9.1	Active	HRMS	Human Resources
PAYR	8.0 SP1	Inactive	Payroll	Payroll
PAYR	8.3	Inactive	Payroll	Payroll
PAYR	8.8	Inactive	Payroll	Payroll
PAYR	8.9	Inactive	Payroll	Payroll

<i>Link Category</i>	<i>Link Version</i>	<i>Action Flag</i>	<i>Long Description</i>	<i>Description</i>
PAYR	9.0	Inactive	Payroll	Payroll
PAYR	9.1	Active	Payroll	Payroll
RELA	Other	Active	Related Actions	Related Actions
SACT	Other	Active	Suggested Actions	Suggested Actions
STOCK	8.0 SP1	Inactive	Stock	Stock
STOCK	8.3	Inactive	Stock	Stock
STOCK	8.8	Inactive	Stock	Stock
STOCK	8.9	Inactive	Stock	Stock
STOCK	9.0	Inactive	Stock	Stock
STOCK	9.1	Active	Stock	Stock
TRNG	8.0 SP1	Inactive	Training	Training
TRNG	8.3	Inactive	Training	Training
TRNG	8.8	Inactive	Training	Training
TRNG	8.9	Inactive	Training	Training
TRNG	9.0	Inactive	Training	Training
TRNG	9.1	Active	Training	Training

Link Definitions Delivered by the PeopleSoft System (Content References)

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

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

Link Definitions for PeopleSoft HCM 9.1

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BN_ENRL_SUMMARY	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ALLOCATION_GBL	CAR_ALLOCATION	EMPLID
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_GBL	CAR_PLAN	EMPLID
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMM_GBL7	WF_JOB_SUMMARY	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	LNMGGB	Maintain Loans – GBR	HC_GPGB_EE_LOANS_GBL	GPGB_EE_LOAN_DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_LOAN_RV_GBL	GPGB_EE_LOAN_RV	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	LONFR	Request Loans - FRA	HC_GPFR_LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ONPAY_GBL	GPFR_ONPAY_SUM	EMPLID
PAYR	PAYGB	Payslip - GBR	HC_GPGB_PSLIP_PU_PNLG_GBL	GPGB_PSLIP_PU	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDNT_CRS_DT2_GBL	COURSE_STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDNT_CRS_SU3_GBL	TRN_STUDNT_CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 9.0

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BENEFITS_SUMMARY1	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ALLOCATION_GBL	CAR_ALLOCATION	EMPLID
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_GBL	CAR_PLAN	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_ _BENEFIT_GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_DEM_ EM	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_ BENEFITS_GBL4	HEALTH_ BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_ BENEF_GBL	LIFE_ADD_ BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_ _PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_ PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_ PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_ PLANS_GBL	SAVINGS_ PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_ BENEFIT_GBL	VACATION_ BENEFIT	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID

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

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

Link Definitions for PeopleSoft HCM 8.9

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

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	BKACT	Bank Accounts	HC_PYE_ BANKACCT_ GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_ DEPOSIT_CAN_ CAN	DIRECT_ DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_ DEPOSIT_USA3	DIRECT_ DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_ DEPOSIT_USA5	DIRECT_ DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_ DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_ DATA_USA8	GENL_DED_ DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_ DATA_CAN	GENL_DED_ DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_ DATA_USF	GENL_DED_ DATA	EMPLID
PAYR	LNMGGB	Maintain Loans – GBR	HC_GPGB_EE_ LOANS_GBL	GPGB_EE_LOAN _DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_ LOAN_RV_GBL	GPGB_EE_LOAN _RV	EMPLID
PAYR	LONFR	Request Loans - FRA	HC_GPFR_ LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_ DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ ONPAY_GBL	GPFR_ONPAY_ SUM	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	PAYGB	Payslip - GBR	HC_GPGB_PSLIP_PU_PNLG_GBL	GPGB_PSLIP_PU	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
TRNG	CENRL	Course Enrollment	HC_TRN_ STUDNT_CRS_ DT2_GBL	COURSE_ STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_ STUDNT_CRS_ SU3_GBL	TRN_STUDNT_ CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 8.8

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENE	Election Entry	HC_BAS_ ELECTION_ ENTRY_GBL	BAS_ELECT_ EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_ BENEFIT_GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_DEM_ EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_ BENEFITS_CAN_ GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_GBL	FSA_BENEFITS	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_ CAN_CAN	TAX_DATA_ CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_ USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_ USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_ SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_ _STOK002_GBL9	ST_RUNCTL_ STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_ STUDNT_CRS_ DT2_GBL	COURSE_ STUDNT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_ STUDNT_CRS_ SU3_GBL	TRN_STUDNT_ CRS_SUM	EMPLID

Link Definitions for PeopleSoft HCM 8.3

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENE	Election Entry	HC_BAS_ ELECTION_ ENTRY_GBL	BAS_ELECT_ EVENT 1	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_ _BENEFIT_GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_DEM_ EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_ BENEFITS_CAN_ _GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_ BENEFITS_GBL4	HEALTH_ BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_ BENEF_GBL	LIFE_ADD_ BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_ _PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_ PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_ PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_ PLANS_GBL	SAVINGS_ PLANS1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	VACP	Vacation Plans	HC_VACATION_ BENEFIT_GBL	VACATION_ BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_ EMERGENCY_ CONTACT_GBL4	EMERGENCY_ CONTACT	EMPLID
HRMS	JOB	Job Data Information	HC_JOB_DATA_ GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_ SUMMARY_ GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_ DATA_GBL7	PERSONAL_ DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_ DEPOSIT_CAN_ CAN	DIRECT_ DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_ DEPOSIT_USA3	DIRECT_ DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_ DEPOSIT_USA5	DIRECT_ DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_ DATA_USA8	GENL_DED_ DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_ DATA_CAN	GENL_DED_ DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_ DATA_USF	GENL_DED_ DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ ADD_CAN	PAY_SHEET_ ADD_S	EMPLID

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

Link Definitions for PeopleSoft HCM 8.0 SP1

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENE	Election Entry	HC_BAS_ ELECTION_ ENTRY_GBL	BAS_ELECT_ EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_ BENEFIT_GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_DEM_ EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_ BENEFITS_CAN_ GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_ BENEFITS_GBL4	HEALTH_ BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_ BENEF_GBL	LIFE_ADD_ BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GVT_GENL_DED_DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_ADD_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDENT_CRS_DT2_GBL	COURSE_STUDENT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDENT_CRS_SU3_GBL	TRN_STUDENT_CRS_SUM	EMPLID

Link Definitions for Campus Solutions

This table lists the link definitions delivered by PeopleSoft CRM

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

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

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
ACAD	ACD05	Search Classess	HC_CLASS_SEARCH_GBL4		EMPID
ACAD	ACD06	Search Course Catalog	HC_SSS_BROWSE_CATLG_GBL3		EMPID
ACAD	ACD07	Exam Schedule	HC_EXAM_SCHEDULE_GBL	SSR_SSENRL_TERM	EMPID
ACAD	ACD08	Student Grades	HC_STDNT_GRADE_INQ_GBL		EMPID
ACAD	ACD09	Request Transcript	HC_TSCRPT_RQST_GBL		EMPID
ACAD	ACD10	Request Advisement Report	HC_SAA_RPT_RQST		EMPID
ACAD	ACD11	Transfer Course Credit	HC_TRNS_CRSE_MNL_GBL		EMPID
ACAD	ACD12	Transfer Test Credits	HC_TRNS_TEST_MNL_GBL		EMPID
ACAD	ACD013	Transfer Other Credits	HC_TRNS_OTHR_GBL		EMPID
ADM	ADM10	Admission Applications	HC_ADM_APPL_MAINTNCE_GBL1		EMPID
ADM	ADM20	Test Results	HC_ACAD_TST_RSLT_PERS_GBL		EMPID
ADM	ADM30	External Education	HC_ACAD_HISTORY_PERS_GBL		EMPID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
CR	CR10	Contributor Profile	HC_AV_PRSN_BIO_DEMO_GBL		EMPID
CR	CR20	Relationship Summary	HC_AV_CNST_RELATION_GBL		EMPID
CR	CR30	Giving History	HC_AV_P_GPROFILE_GBL		EMPID
CS	CS10	Student Services Center	HC_SCC_STDCTR_ADMIN	SSS_STUDENT_CENTER	EMPID
CS	CS100	Comment Summary	HC_OPR_3C_SUM_PERS_GBL3		EMPID
CS	CS20	Constituent Addresses	HC_ADDRESS_MAINT_GBL2		EMPID
CS	CS30	Constituent Electronic Address	HC_E_MAIL_ADDR_PERS_GBL		EMPID
CS	CS40	Constituent Phones	HC_PHONE_PERS_GBL		EMPID
CS	CS50	Emergency Contact	HC_EMERG_NTC_SA_PERS_GBL		EMPID
CS	CS60	Manage Service Indicators	HC_SCC_SI_SUMRY_PERS		EMPID
CS	CS70	Affiliations	HC_SCC_AFL_ADDUPD_GBL		EMPID
CS	CS80	Checklist Summary	HC_CHKLST_SUMM_PERS_GBL5		EMPID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
CS	CS90	Communication Summary	HC_COMM_SUMMARY_PERS_GBL4		EMPID
FIN	FIN10	Financial Aid Status	HC_SS_FA_AU_STATUS_GBL		EMPID
FIN	FIN20	View Term Award Summary	HC_STDNT_AWRD_INQUIRY_GBL		EMPID
FIN	FIN30	View Anticipated Aid by Term	HC_ANTICIPTD_AID_SUMM_GBL		EMPID
FIN	FIN40	Account Summary	HC_ACCOUNT_VW_GBL4		EMPID
FIN	FIN50	Payment Plan	HC_PAYMENT_PLAN_GBL		EMPID
FIN	FIN60	Tuition Calculation	HC_TUITION_CALC_GBL		EMPID
FIN	FIN70	Pay Tuition Fee	HC_GRP_QUICK_POST_GBL		EMPID
FIN	FIN80	Miscellaneous Fees	HC_OPT_FEE_STDNT_GBL		EMPID

Link Definitions for Oracle E-Business HCM

This table lists the link definitions delivered by PeopleSoft CRM

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

Category	Link Name	Short Name	Content Reference	Search Key
EBABS	ABENT	Absences Entry	CR_RC_HRHD_EBS_ABENT	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBABS	ABMNG	Absence Management	CR_RC_HRHD_EBS_ABSMAN	P_PERSON_ID P_BGID
EBABS	ACCRV	View Accruals	CR_RC_HRHD_EBS_ACCRUALS	P_PERSON_ID P_BGID
EBASN	ASNEX	Assignment Extra Information	CR_RC_HRHD_EBS_ASSIGNNX	P_PERSON_ID P_BGID
EBASN	ASNRT	Assignment Rate	CR_RC_HRHD_EBS_ASSIGNNR	P_PERSON_ID P_BGID
EBASN	ASSGN	Assignment	CR_RC_HRHD_EBS_ASSIGNMENT	P_PERSON_ID P_BGID
EBASN	COST	Change Cost Center	CR_RC_HRHD_EBS_CHGCOST	P_PERSON_ID P_BGID
EBASN	HOURS	Change Hours	CR_RC_HRHD_EBS_CHGHR	P_PERSON_ID P_BGID
EBASN	HRVW	HE Views	CR_RC_HRHD_EBS_HRVIEW	P_PERSON_ID P_BGID
EBASN	JOB	Change Job	CR_RC_HRHD_EBS_CHGJOB	P_PERSON_ID P_BGID
EBASN	PREF	Work Preferences	CR_RC_HRHD_EBS_WORKPREF	P_PERSON_ID P_BGID
EBASN	RELIN	Release Information	CR_RC_HRHD_EBS_RELEASE	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBASN	STAT	Worker Status Change	CR_RC_HRHD_EBS_ WORKSTAT	P_PERSON_ID P_BGID
EBASN	TENUR	Tenure Status	CR_RC_HRHD_EBS_ TENURE	P_PERSON_ID P_BGID
EBCMP	BNBAL	Person Benefits Balances	CR_RC_HRHD_EBS_ PERBENBAL	P_PERSON_ID P_BGID
EBCMP	BSASN	Person Benefit Assignment	CR_RC_HRHD_EBS_ PERBENASSIGN	P_PERSON_ID P_BGID
EBCMP	COBRA	COBRA Qualified Beneficiaries	CR_RC_HRHD_EBS_ COBRABEN	P_PERSON_ID P_BGID
EBCMP	COURT	Court Order Form	CR_RC_HRHD_EBS_ COURT	P_PERSON_ID P_BGID
EBCMP	DEPNB	Dependent/Beneficiary	CR_RC_HRHD_EBS_ DEPBEN	P_PERSON_ID P_BGID
EBCMP	ENACT	Person Enrollment Action Items	CR_RC_HRHD_EBS_ ENRLACTION	P_PERSON_ID P_BGID
EBCMP	ENCRT	Enrollment Certifications	CR_RC_HRHD_EBS_ ENRLCERT	P_PERSON_ID P_BGID
EBCMP	ENROL	View Enrollment Results	CR_RC_HRHD_EBS_ ENRLRESULTS	P_PERSON_ID P_BGID
EBCMP	FLEX	Flex Program Enrollment	CR_RC_HRHD_EBS_ FLEX	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBCMP	LIFE	Process Life Events	CR_RC_HRHD_EBS_ LIFEEVENTS	P_PERSON_ID P_BGID
EBCMP	NONFL	Non Flex Program Enrollment	CR_RC_HRHD_EBS_ NONFLEX	P_PERSON_ID P_BGID
EBCMP	OVRRD	Override Plan Enrollment	CR_RC_HRHD_EBS_ ENRLOVER	P_PERSON_ID P_BGID
EBCMP	PERCM	Person Communications	CR_RC_HRHD_EBS_ PERCOM	P_PERSON_ID P_BGID
EBCMP	PLENR	Miscellaneous Plan Enrollment	CR_RC_HRHD_EBS_ MISC	P_PERSON_ID P_BGID
EBCMP	PRIMC	Primary Care Provider	CR_RC_HRHD_EBS_ PRIMCARE	P_PERSON_ID P_BGID
EBCMP	PRTIN	View Participant Information	CR_RC_HRHD_EBS_ VPARTINFO	P_PERSON_ID P_BGID
EBCMP	PRTOV	Participation Override	CR_RC_HRHD_EBS_ PARTOVR	P_PERSON_ID P_BGID
EBCMP	RECPY	Record Continuing Payments	CR_RC_HRHD_EBS_ CONTBEN	P_PERSON_ID P_BGID
EBCMP	REIMB	Reimbursement Requests	CR_RC_HRHD_EBS_ REIMBURSE	P_PERSON_ID P_BGID
EBCMP	SAVEN	Savings Plan Enrollment	CR_RC_HRHD_EBS_ SAVEPLAN	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBCMP	WHAT	What-if Eligibility	CR_RC_HRHD_EBS_ WHATIF	P_PERSON_ID P_BGID
EBHR	ADDR	Address	CR_RC_HRHD_EBS_ ADDRESS	P_PERSON_ID P_BGID
EBHR	APPL	Application	CR_RC_HRHD_EBS_ APPLICATION	P_PERSON_ID P_BGID
EBHR	CNTCT	Contact	CR_RC_HRHD_EBS_ CONTACT	P_PERSON_ID P_BGID
EBHR	COMDL	Communication Delivery Method	CR_RC_HRHD_EBS_ COMMDEL	P_PERSON_ID P_BGID
EBHR	EDUCA	Education and Qualification	CR_RC_HRHD_EBS_ EDUCATE	P_PERSON_ID P_BGID
EBHR	EXINF	Extra Information Type	CR_RC_HRHD_EBS_ XINFO	P_PERSON_ID P_BGID
EBHR	INFO	Personal Information	CR_RC_HRHD_EBS_ PERINFO	P_PERSON_ID P_BGID
EBHR	MEDIC	Medical Assessments	CR_RC_HRHD_EBS_ MEDICALASSESS	P_PERSON_ID P_BGID
EBHR	OTHQL	Other Qualification	CR_RC_HRHD_EBS_ OTHERQUAL	P_PERSON_ID P_BGID
EBHR	PERDT	Enter Person Details	CR_RC_HRHD_EBS_ PERDETAILS	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBHR	PERX	Person Extra Information	CR_RC_HRHD_EBS_PERSONX	P_PERSON_ID P_BGID
EBHR	PHONE	Phone	CR_RC_HRHD_EBS_PHONE	P_PERSON_ID P_BGID
EBHR	PICT	Picture	CR_RC_HRHD_EBS_PICTURE	P_PERSON_ID P_BGID
EBHR	PRVEM	Previous Employment	CR_RC_HRHD_EBS_PREVEMPL	P_PERSON_ID P_BGID
EBHR	QUALF	Qualification	CR_RC_HRHD_EBS_QUAL	P_PERSON_ID P_BGID
EBHR	RANK	Academic Rank	CR_RC_HRHD_EBS_RANK	P_PERSON_ID P_BGID
EBHR	RECOR	Document of Records	CR_RC_HRHD_EBS_DOCREC	P_PERSON_ID P_BGID
EBHR	SCHOL	School/College Attended	CR_RC_HRHD_EBS_SCHOOL	P_PERSON_ID P_BGID
EBHR	SPECI	Special Information	CR_RC_HRHD_EBS_SPECIALINFO	P_PERSON_ID P_BGID
EBHR	SPINF	Special Information Types	CR_RC_HRHD_EBS_SINFO	P_PERSON_ID P_BGID
EBMWK	MNTCW	Maintaining Contingent Worker	CR_RC_HRHD_EBS_TMPLCW	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBMWK	MNTEM	Maintaining Employee	CR_RC_HRHD_EBS_ TMPEMPL	P_PERSON_ID P_BGID
EBMWK	MNTVI	Maintaining Visa	CR_RC_HRHD_EBS_ TMPLVISA	P_PERSON_ID P_BGID
EBPAY	ASSGN	Assignment Process Results	CR_RC_HRHD_EBS_ ASSIGNRES	P_PERSON_ID P_BGID
EBPAY	CMPT	Total Compensation	CR_RC_HRHD_EBS_ TOTALCOMP	P_PERSON_ID P_BGID
EBPAY	EARN	Statement of Earnings	CR_RC_HRHD_EBS_ EARNINGS	P_PERSON_ID P_BGID
EBPAY	EHIST	View Entry History	CR_RC_HRHD_EBS_ ENTRYHIST	P_PERSON_ID P_BGID
EBPAY	ELEM	Element Entries	RC_HRHD_EBS_ ELEMENT	P_PERSON_ID P_BGID P_FUNCNAME
EBPAY	EMVBL	View Employee Balances	CR_RC_HRHD_EBS_ EMPLBALANCE	P_PERSON_ID P_BGID
EBPAY	EXPAY	External/Manual Payments	CR_RC_HRHD_EBS_ MANPAY	P_PERSON_ID P_BGID
EBPAY	PAYMN	Manage Payroll Payments	CR_RC_HRHD_EBS_ PAYPAY	P_PERSON_ID P_BGID
EBPAY	PAYSL	Pay Slip	CR_RC_HRHD_EBS_ PAYSLIP	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBPAY	PRSPY	Personal Pay Methods	CR_RC_HRHD_EBS_ PAYMETH	P_PERSON_ID P_BGID
EBPAY	SALHS	Salary History	CR_RC_HRHD_EBS_ SALHIST	P_PERSON_ID P_BGID
EBPAY	TXBAL	View Tax Balances	CR_RC_HRHD_EBS_ TAXBALANCE	P_PERSON_ID P_BGID
EBPUK	MILE	Mileage Claim	CR_RC_HRHD_EBS_ CLAIM	P_PERSON_ID P_BGID
EBPUK	P45	P45 Form	CR_RC_HRHD_EBS_ P45	P_PERSON_ID P_BGID
EBPUK	PAY11	P11D	CR_RC_HRHD_EBS_ P11D	P_PERSON_ID P_BGID
EBPUK	PRVEH	Private Vehicle Entry	CR_RC_HRHD_EBS_ PVEHICLE	P_PERSON_ID P_BGID
EBPUK	SSP	SSP/SMP/Paternity/ Adoption	CR_RC_HRHD_EBS_ SSP	P_PERSON_ID P_BGID
EBPUK	TAX	Tax Information	CR_RC_HRHD_EBS_ FEDTAX	P_PERSON_ID P_BGID
EBPUK	TAXBL	Tax Balances	CR_RC_HRHD_EBS_ ADJUSTTAX	P_PERSON_ID P_BGID
EBPUK	TXINF	UK Tax Information	CR_RC_HRHD_EBS_ UKTAX	P_PERSON_ID P_BGID

Category	Link Name	Short Name	Content Reference	Search Key
EBPUK	TXSUM	Tax Balance Summary	CR_RC_HRHD_EBS_ TAXBALSUM	P_PERSON_ID P_BGID
EBPUK	W2	Employee W-2	CR_RC_HRHD_EBS_ W2	P_PERSON_ID P_BGID
EBPUK	W4	W-4	CR_RC_HRHD_EBS_ W4	P_PERSON_ID P_BGID

Link Definitions for PeopleSoft CRM

This table lists the link definitions delivered by PeopleSoft CRM.

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

Category	Link Name	Short Name	Portal CREF	Content Reference	Class Path	Class ID	Search Key	Method
RELA	ASSET	Asset Summary	Employee	CR_RC_ASSET_ SUMMARY			cfResource Identifier	
RELA	BPDEF	Defect Workflow	Employee		RC_LINK:APPS _RC	PCode	RC_BUS_PROCESS _ID	Execute Business Project
RELA	BPRJ	Business Project	Employee		RC_LINK:APPS _RC	PCode		Execute GenBusiness Project
RELA	BSCR	Branch Script	Employee		RC_LINK:APPS _RC	PCode		Execute Gen-Script
RELA	CREQ	Change Request - Create New	Employee		RC_LINK:APPS _RC	PCode		Create Change Request

Category	Link Name	Short Name	Portal CREF	Content Reference	Class Path	Class ID	Search Key	Method
RELA	EM	Enterprise Manager						
RELA	FRAUD	Case Fraud Workflow			RC_LINK:APPS_RC	PCode	BP_ID	Execute Business Project
RELA	LEAD	Sales Lead	Employee		RC_LINK:APPS_RC	PCode		CreateLead
RELA	NDEF	Defect - Create New	Employee		RC_LINK:APPS_RC	PCode		CreateDefect
RELA	OFFR	Offer History						
RELA	ORDER	Sales Order	Employee		RC_LINK:APPS_RC	PCode		Create Sales-Order
RELA	RCREQ <u>Note:</u> Applies only to HelpDesk, not HR HelpDesk	Change Request - Relate	Employee		RC_LINK:APPS_RC	PCode		Relate Change Request
RELA	RDEF	Defect - Relate Existing	Employee		RC_LINK:APPS_RC	PCode		RelateDefect
RELA	REMOT	Remote Control	Employee	CR_RC_REMOTE_CONTROL			cfResource Identifier	
RELA	RMA	Create RMA	Employee		RC_LINK:APPS_RC	PCode		CreateRMA
RELA	SO	Service Order	Employee		RC_LINK:APPS_RC	PCode		CreateSO

Category	Link Name	Short Name	Portal CREF	Content Reference	Class Path	Class ID	Search Key	Method
RELA	SWDEL	Software Delivery	Employee	CR_RC_SOFTWARE_DELIVERY				
RELA	WEBAD	Asset Administrator	Employee	CR_RC_ASSET_ADMIN			cfResource Identifier	
RELA	WO	Work Order - Create New	Employee		RC_LINK:APPS_RC	PCode		CreateWO
RELA	SRVY	Case Survey			RC_LINK:APPS_RC	PCode		Send Survey

Setting Up Content References

This topic discusses how to set up content references.

Pages Used to Set Up Content References

Page Name	Definition Name	Usage
Content Ref Administration Page	PORTAL_CREF_ADM	Set up content references.
Content Reference Security Page	PORTAL_CREF_SEC	Set up security for content references.

Setting Up Content References

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

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

See the product documentation for *PeopleTools: Portal Technology*.

Setting Up Security for Content References

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

Viewing and Modifying Link Definitions

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

This topic discusses how to view and modify link definitions.

Pages Used to View and Modify Link Definitions

Page Name	Definition Name	Usage
Link Category Definition Page	RC_LINK_CAT_PNL	View and modify the categories into which link definitions are organized.
Link Definition Page	RC_LINK_PNL	View and modify link definitions.
Link Group Page	RC_LINK_GROUP	View and modify the link groups into which link categories are organized.

Link Category Definition Page

Use the Link Category Definition page (RC_LINK_CAT_PNL) to view and modify the categories into which link definitions are organized.

Navigation:

Set Up CRM > Product Related > Call Center > Link Category > Link Category

This example illustrates the fields and controls on the Link Category Definition page.

Link Category Definition

Link Category ADM

Version 9.1

Link Category Details

Order

*Active Flag

*Short Name

Link Image

*Long Description

This object was delivered by PeopleSoft but updated by the customer.

Created 03/21/2008 3:49PM PDT

By QA

Modified 04/24/2008 2:33PM PDT

By lpham

* Required Field

Field or Control	Description
Order	Enter a number to indicate the order in which you want the item to appear on the Case page
Short Name and Long Description	Enter descriptions to identify the link category you are adding or modifying.
Active Flag	Select either <i>Active</i> or <i>Inactive</i> .
Modify System Data	Click to modify the system data and select or enter information into the Active Flag , Order , Short Name , and Long Description fields. The following message appears: <i>This object was delivered by PeopleSoft but updated by the customer.</i>

Link Definition Page

Use the Link Definition page (RC_LINK_PNL) to view and modify link definitions.

Navigation:

Set Up CRM > Product Related > Call Center > Link Definition > Link Definition

This example illustrates the fields and controls on the Link Definition page (1 of 2).

Link Definition

Link Category ADM

Description Admissions

Version 9.1

Links

1-3 of 3

Admission Applications

Test Results

External Education

Create a New Link

Link Details

Delete

*Link Name ADM10

*Short Name Admission Applications

Self-Service Admission Applications

Long Description Admissions - Admission App

*Status Active

☒ Default
☐ Solvable
☒ Open in New Window
☐ Self-Service
☐ SetID Enabled

Transfer Details

Portal CREF

Portal Name EMPLOYEE

Page Name

PeopleCode

Class ID

Class Path

Portal Object Name HC_ADM_APPL_MAINTNCE

Link Test

Action Update/Display

Package Tree Viewer

Method Name

Search Keys

*Field Name	Term Name	Select Term
EMPLID	Emplid the case is created for	

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This example illustrates the fields and controls on the Link Definition page (2 of 2).

Drilldown Details

*Navigation

Market

Related Object Status Details

☐ PeopleCode

Class ID

Class Path

Package Tree Viewer

Method Name

☐ Static Value

Static Status

Modify System Data

This object is maintained by PeopleSoft.

Created

04/01/2008 2:32PM PDT

Modified

04/01/2008 2:32PM PDT

By

QA

By

QA

Link Details

Field or Control	Description
Link Name	Enter a name for this link.
Short Name	Enter a short name for this link definition. The text you enter in this field appears on the Link Group page in the drop-down list box for the Link Category field.
Self-Service	The text you enter in this field appears on the self-service application page.
Long Description	Enter a long description. Use this field to describe a particular link definition in more detail.
Status	Select either <i>Active</i> or <i>Inactive</i>. The system includes only the active link definitions in the Link Category drop-down list box on the Case page.
Default	Select this check box if you want the link to become the default for the category when it appears on the Case page. Note: Because users may not have access to all links, you can set multiple defaults.

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

Transfer Details

<i>Field or Control</i>	<i>Description</i>
Portal CREF	Select this option to create a portal content reference.
Portal Name	Select the object name that you want to associate with the link.
Content	The actual content reference.
Action	Select the page mode that appears when the page is accessed. Values are <i>Add</i> , <i>Correction</i> , <i>Update/Display</i> or <i>Update/Display All</i> .
PeopleCode	Select this option if the PeopleCode method needs to be invoked when the action is performed.
Class ID	Specify the name of the application class.
Class Path	Specify the class path of the application package.
Method Name	Specify the method name.
Field Name	This field identifies the search keys that the system uses to access the linked component. Search keys can be mentioned by associating terms that are used in AAF policies. These terms are resolved when an action is performed from the Case page. For example, EMPLID (employee ID) is the search key used for most PeopleSoft HCM transactions and is associated as Term to the link definition. Term can also be configurable. Users can click the Lookup button to provide the value for the configurable term. For example, see the Defect Workflow Link Definition in the Related Actions Link category. Note: To bypass the Send Case Survey page when an agent selects the <i>Case Survey</i> link, modify the system data and use the Search Keys group box to select the last three terms that appear under Call Center, Link Definition after you select the Add Term button. These terms include: <i>Select a Dialog Business Unit <BUSINESS_UNIT></i>, <i>Select a Dialog ID <DIALOG_ID></i>, and <i>Select an External Event Trigger <EXT_EVENT_TRIGGER></i>.

Field or Control	Description
Term Name	This value is not editable if the selected term is not configurable. If the selected term is configurable, then this field appears as a link. See “Understanding AAF” (Automation and Configuration Tools).

DrillDown Details

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

Field or Control	Description
Navigation	Select the transaction ID of the page to which you want the system to navigate.
Market	Select the object name that you want to associate with the link.

Related Object Status Details

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

Field or Control	Description
PeopleCode	Select this option to invoke PeopleCode to capture the status of the action.
Class ID	Enter the name of the application class.
Class Path	Enter the class path of the application package.
Method Name	Enter the method name.
Static Value	Select this option if the static status value needs to appear for an action.
Static Status	Select the static status value that will appear for this link definition.

Link Group Page

Use the Link Group page (RC_LINK_GROUP) to view and modify the link groups into which link categories are organized.

Navigation:

Set Up CRM > Product Related > Call Center > Link Group > Link Group

This example illustrates the fields and controls on the Link Group page.

Link Group

Link Group HEIT

***Description** Higher Education IT Actions

Solution Setid
 Description

Link Selection
Personalize | Find |
First 1-10 of 10 Last

Links System Data

*Link Category	*Version	*Link Name		
Related Actions	OTH	Asset Summary		
Related Actions	OTH	Business Project		
Related Actions	OTH	Change Request - Create New		
Related Actions	OTH	Defect - Create New		
Related Actions	OTH	Change Request - Relate		
Related Actions	OTH	Defect - Relate Existing		
Related Actions	OTH	Remote Control		
Related Actions	OTH	Software Delivery		
Related Actions	OTH	Asset Administrator		
Related Actions	OTH	Work Order - Create New		

Link Selection - Links

Field or Control	Description
Description	Enter a description of the link group that you want to create.
Link Category	Select a link category that contains the desired link definition that you want in this link group. Only active link categories are available for selection.

Field or Control	Description
Version	Select a version. A category can have multiple versions, each associated with a different target system (for example, PeopleSoft HCM 8.9, PeopleSoft HCM 8.8, and so on). Note: Active versions appear in this drop-down list box for selection. However, Oracle recommends that only one version of each link category is activated at any time.
Link Name	Select a link name. Only those link definitions that are defined within the selected link category appear in the drop-down list box.

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

Link Selection - System Data

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

Related Links

[Defining Display Template General Options for PeopleSoft Call Center](#)

Setting Up PeopleSoft Change Management

Understanding PeopleSoft Change Management Setup

This topic discusses:

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

Change Management Usages

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

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

See [Understanding Change Request Management](#).

Change Request Prompt Tables

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

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

- Business Reason
- Category
- Component Audit
- Impact
- Note Type
- Phase

- Phase Template
- Phase Template Use
- Priority
- Relationship Type
- Resolution
- Request Type
- Status
- Status Transition
- Sub Type
- Task Type Role Map

Phase Templates

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

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

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

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

Transitions and Active Analytics Framework

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

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

See “Understanding AAF” (Automation and Configuration Tools).

Task Type Role Map and the Assignment Engine

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

Security Considerations for Accessing Change Management Tasks

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

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

See "Application Security" (Application Fundamentals).

See "Defining Application Security" (Application Fundamentals).

Setting Up Prompt Tables for Change Requests

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

This topic discusses how to set up prompt tables for change requests.

Pages Used to Set Up Prompt Tables for Change Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Business Reason Page</u>	RG_UD_REQ_BUSR	Set up change request business reasons.
<u>Category Page</u>	RG_UD_REQ_CATGY	Set up change request categories.
<u>Component Audit Page</u>	RG_UD_REQ_AUDIT	Select the record or table name for which you want the system to generate and maintain audit records.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Impact Page</u>	RG_UD_REQ_IMPACT	Set up change request impact values.
<u>Note Type Page</u>	RG_UD_REQ_NOTT	Set up note types.
<u>Phase Page</u>	RG_UD_REQ_STATE	Set up change request phases.
<u>Priority Page</u>	RG_UD_REQ_PRTY	Set up change request priorities.
<u>Relationship Types Page</u>	RG_UD_REL_TYPE	Set up descriptions of relationships that you want to appear on the Relate Existing Change Request page for change management cases that have a correlation in some way.
<u>Resolution Page</u>	RG_UD_REQ_RESO	Set up change request resolutions.
<u>Request Type Page</u>	RG_UD_REQ_TYPE	Set up change request types.
<u>Status Page</u>	RG_UD_REQ_STATUS	Set up change request statuses.
<u>Status Transition Page</u>	RG_UD_PHS_TRANS	Set up notifications when a change in status occurs.
<u>Sub Type Page</u>	RG_UD_REQ_SUB_TYPE	Set up change request subtypes.

Business Reason Page

Use the Business Reason page (RG_UD_REQ_BUSR) to set up change request business reasons.

Navigation:

Set Up CRM > Product Related > Change Management > Business Reason > Business Reason

This example illustrates the fields and controls on the Business Reason page.

Business Reason

SetID SHARE

Business Reason Personalize Find [Grid Icon] First 1-4 of 4 Last

*Reason	*Description			
BUSR	Business Requirement	[Edit]	[Delete]	[Add]
FACL	Facility Related	[Edit]	[Delete]	[Add]
INTR	CI Intro/Upgrade/Renewal	[Edit]	[Delete]	[Add]
PROB	Problem/Incident Resolution	[Edit]	[Delete]	[Add]

Add new Business Reason

* Required Field

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

Category Page

Use the Category page (RG_UD_REQ_CATGY) to set up change request categories.

Navigation:

Set Up CRM > Product Related > Change Management > Change Management Category > Change Management Category

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

Category

SetID SHARE

&Category Personalize Find [Grid Icon] First 1-3 of 3 Last

*Category	*Description			
MAJR	Major	[Edit]	[Delete]	[Add]
MINR	Minor	[Edit]	[Delete]	[Add]
SIGN	Significant	[Edit]	[Delete]	[Add]

Add new Category

* Required Field

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

Component Audit Page

Use the Component Audit page (RG_UD_REQ_AUDIT) to select the record or table name for which you want the system to generate and maintain audit records.

Navigation:

Set Up CRM > Product Related > Change Management > Component Audit > Component Audit

This example illustrates the fields and controls on the Component Audit page.

Component Audit

*Component Name *Audit Record Name

Description

Record (Table) Name	Add	Change	Delete
RG_CHANGE_ATCH	☐	☒	☐
RG_CHANGE_INTR	☐	☒	☐
RG_CHANGE_NOTE	☐	☒	☐
RG_CHANGE_PROD	☐	☒	☐
RG_CHANGE_RCHG	☐	☒	☐
RG_CHANGE_REQST	☐	☒	☐
RG_CHANGE_ROBJ	☐	☒	☐
RG_CHANGE_STATE	☐	☒	☐

☐ Show Field Label

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

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

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

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

Impact Page

Use the Impact page (RG_UD_REQ_IMPACT) to set up change request impact values.

Navigation:

Set Up CRM > Product Related > Change Management > Change Request Impact Table > Change Request Impact Table

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

Impact

SetID SHARE

Personalize | Find | First 1-4 of 4 Last

*Impact	*Description			
MAJ	Major			
MIN	Minor			
SIGN	Significant			
TRIV	Trivial			

Add new Impact

* Required Field

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

Note Type Page

Use the Note Type page (RG_UD_REQ_NOTT) to set up note types.

Navigation:

Set Up CRM > Product Related > Change Management > Note Type > Note Type

This example illustrates the fields and controls on the Note Type page.

Note Type

SetID SHARE

Personalize | Find | First 1-10 of 10 Last

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

Add New Note Type

* Required Field

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

Phase Page

Use the Phase page (RG_UD_REQ_STATE) to set up change request phases.

Navigation:

Set Up CRM > Product Related > Change Management > Change Request Phase Table > Change Request Phase Table

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

Phase

SetID
SHARE

Personalize
Find

First
1-10 of 10
Last

*Phase	*Description			
APPR	Approved			
CHPL	Change Planning			
DEV	In Development			
HOLD	On Hold			
IMPL	Implementation			
PLAT	Platform Test			
POST	Post Mortem Review			
PROP	Proposed			
RE VW	In Review			
TEST	In Test			

Add New Phase

* Required Field

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

Priority Page

Use the Priority page (RG_UD_REQ_PRTY) to set up change request priorities.

Navigation:

Set Up CRM > Product Related > Change Management > Change Request Priority > Change Request Priority

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

Priority

SetID SHARE

Personalize | Find | | First 1-4 of 4 Last

*Priority	*Description			
EMRG	Emergency			
HIGH	High			
LOW	Low			
MEDM	Medium			

Add New Priority

* Required Field

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

Relationship Types Page

Use the Relationship Types page (RG_UD_REL_TYPE) to set up descriptions of relationships that you want to appear on the Relate Existing Change Request page for change management cases that have a correlation in some way.

Navigation:

Set Up CRM > Product Related > Change Management > CR Relationship Type > Relationship Types

This example illustrates the fields and controls on the Relationship Types page.

Relationship Types

SetID CRM01

Find | View All First 1 of 3 Last

+ -

*Relationship Type COMN Short Description Common

Long Description Common

Parent Label Parent Child Label Child

Equivalent Label ☐ Hierarchical

Modified 02/24/2004 11:55AM PST DPHELPS

* Required Field

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

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

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

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

Resolution Page

Use the Resolution page (RG_UD_REQ_RESO) to set up change request resolutions.

Navigation:

Set Up CRM > Product Related > Change Management > Resolution > Resolution

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

Resolution

SetID CRM01

Resolution Personalize | Find | First 1-4 of 4 Last

*Resolution	*Description
CANC	Cancelled
DEFR	Deferred
IMPL	Implemented
INPR	In Process

Add New Resolution

* Required Field

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

Request Type Page

Use the Request Type page (RG_UD_REQ_TYPE) to set up change request types.

Navigation:

Set Up CRM > Product Related > Change Management > Request Type > Request Type

This example illustrates the fields and controls on the Request Type page.

Request Type

SetID SHARE

Request Type Personalize Find | | First 1-9 of 9 Last

*Request Type	*Description			
DOC	Documentation			
ENGR	Engineering (Defect Management)			
ENVR	Environmental Infrastructure (Facilities)			
HARD	Hardware			
IT	IT Infrastructure Management procedures			
SOFT	Software			
TACT	Tactical Plans			
TELE	Telecommunication			
TRAN	Training Course			

Add New Request Type

* Required Field

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

Status Page

Use the Status page (RG_UD_REQ_STATUS) to set up change request statuses.

Navigation:

Set Up CRM > Product Related > Change Management > Status > Status

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

Status

SetID SHARE

Status Personalize | Find | First 1-9 of 9 Last

*Status	*Category	*Description	Cascade		
APPR	Change Request is Open	Approved			
BOU	Change Request is Open	Backed Out			
CLOS	Change Request is Closed	Closed	☒		
COMP	Change Request is Closed	Completed			
EXEC	Change Request is Open	Executing			
HOLD	Change Request On-Hold	On Hold			
NEW	Change Request is Open	New			
REJ	Change Request is Canceled	Rejected			
REVW	Change Request is Open	In Review			

[Add New Status](#)

* Required Field

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

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

Status Transition Page

Use the Status Transition page (RG_UD_PHS_TRANS) to set up notifications when a change in status occurs.

Navigation:

Set Up CRM > Product Related > Change Management > Status Transition > Status Transition

This example illustrates the fields and controls on the Status Transition page.

Status Transition

SetID SHARE

Status Transition Personalize | Find | | First 1-14 of 14 Last

*Status From	*Status To	Transition Condition	Edit Condition	Clear Condition		
Approved	Executing		Edit Condition	Clear Condition		
Approved	On Hold		Edit Condition	Clear Condition		
Completed	Backed Out		Edit Condition	Clear Condition		
Completed	Closed		Edit Condition	Clear Condition		
Executing	Completed	All Tasks Completed For Change Request Phase is true	Edit Condition	Clear Condition		
Executing	On Hold	Change Request Priority equals Low And Number Incomplete Tasks For Change Request Status is at least 1	Edit Condition	Clear Condition		
On Hold	Approved		Edit Condition	Clear Condition		
On Hold	Executing		Edit Condition	Clear Condition		

[Add New Status Transition](#)

* Required Field

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

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

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

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

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

Related Links

“Understanding AAF” (Automation and Configuration Tools)

Sub Type Page

Use the Sub Type page (RG_UD_REQ_SUB_TYPE) to set up change request subtypes.

Navigation:

Set Up CRM > Product Related > Change Management > Change Request Subtype > Change Request Subtype

This example illustrates the fields and controls on the Sub Type page.

Sub Type

SetID SHARE

Sub Type

Personalize | Find | |

First 1-8 of 8 Last

*Request Type	*Sub Type	*Description			
ENVR	CHG	Campus opening or closing			
ENVR	LOC	Location change			
HARD	HDRE	CI Reconfiguration			
HARD	RECN	CI Introduction or Removal			
HARD	UPGD	Upgrade			
IT	CHNG	Changed Business Requirement			
IT	NEW	Request new or modified business process			
SOFT	UPGD	Upgrade			

Add New Sub Type

* Required Field

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

Setting Up Change Management Business Units

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

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

Page Used to Set Up Change Management Business Units

Page Name	Definition Name	Usage
<u>Define Change Management Page</u>	BUS_UNIT_TBL_RG	Define business rules for a call center business unit.

Define Change Management Page

Use the Define Change Management page (BUS_UNIT_TBL_RG) to define business rules for a call center business unit.

Navigation:

Set Up CRM > Business Unit Related > Change Management Definition

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

Field or Control	Description
Business Unit	Enter a business unit identifier. To maximize system performance, always use exactly five characters.
Short Description	Enter the description that will appear on the Case page and other places where the business unit appears.
Call Center Business Unit	Select the default call center business unit to use when selecting a case to relate to a change request.
Quality Business Unit	Select the default PeopleSoft Quality Management business unit to use when selecting a case to relate to a change request.

Field or Control	Description
Phase Template Duration	Select either <i>Phase Level</i> or <i>Task Level</i>. Both phases and tasks can have durations. Your selection in this field tells the phase template load process whether to use the phase durations or task durations when loading phases and tasks for a change request. This functionality provides a way to define templates to have the flexibility for either phase or task duration calculations. If you do not select a template duration, the system defaults the value in this field to <i>Phase Level</i>. Note: If you define duration at the task level, the system enters both a start date and an end date using that task duration calculated for the change request. This provides flexibility to define templates that have both parallel and dependant (sequential) tasks on a change request when doing a template load. You can still, however, manually add phases and tasks where tasks can be parallel or dependent.

Setting Up Change Management Defaults

This topic discusses how to set up Change Management defaults.

Page Used to Set Up Change Management Defaults

Page Name	Definition Name	Usage
<u>Defaults Page</u>	BUS_UNIT_RG_DEF	Set up Change Management defaults.

Defaults Page

Use the Defaults page (BUS_UNIT_RG_DEF) to set up Change Management defaults.

Navigation:

Set Up CRM > Business Unit Related > Change Management Definition > Defaults

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

Define Change Management

Defaults

Template Duration Level

Business Unit

Business Unit US200

Business Unit Defaults

Request Type

HARD

Hardware

Sub Type

Status

Business Reason

BUSR

Business Requirement

Priority

HIGH

High

Category

SIGN

Significant

Impact

SIGN

Significant

Template ID

MODEL2A

Software Normal Installation

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

Setting Up Template Duration Levels

This topic discusses how to set up template duration levels.

Page Used to Set Up Template Duration Levels

Page Name	Definition Name	Usage
<u>Template Duration Level Page</u>	BUS_UNIT_DURLVL_RG	Instruct the system on which tasks or phases to display on the Change Request page.

Template Duration Level Page

Use the Template Duration Level page (BUS_UNIT_DURLVL_RG) to instruct the system on which tasks or phases to display on the Change Request page.

Navigation:

Set Up CRM > Business Unit Related > Change Management Definition > Template Duration Level

This example illustrates the fields and controls on the Template Duration Level page.

Business Unit						
Business Unit US200						
Phases						
SetID	Phase Template	Phase	Days	Hours	Last Modified By	Last Modified
CRM01	Software emergency	Change Planning	5		VP1	02/03/2004 11:17AM
CRM01	Software emergency	In Development	9		DPHELPS	11/17/2003 4:34AM
CRM01	Software emergency	In Test	6		DPHELPS	11/17/2003 4:35AM
CRM01	Software emergency	Platform Test	6		DPHELPS	11/18/2003 6:12AM
CRM01	Software Normal Installation	Change Planning	5		DPHELPS	01/30/2004 2:05PM
CRM01	Software Normal Installation	Implementation	16		DPHELPS	11/17/2003 4:37AM
CRM01	Software Normal Installation	In Test	6		DPHELPS	11/17/2003 4:37AM
CRM01	Hardware Installation	Implementation	2	10	DPHELPS	03/15/2004 2:42PM

View

View Phases All

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

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

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

Setting Up Phase Templates

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

This topic discusses how to create phase templates.

Pages Used to Create a Phase Template

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Phase Page</u>	RG_UD_REQ_STATE	Create phases. These phases appear in the Phase drop-down list box on the Phase Template page.
<u>Task Group Template Page</u>	RB_TSK_GRP_TPL	Define task group templates. You associate a task group template to a phase on the Phase Template page.
<u>Phase Template Page</u>	RG_UD_PHS_MODEL	Create the phase template. Identify the phases and the phases' task group templates that you want to associate with the phase template.
<u>Phase Template Use Page</u>	RG_UD_PHS_MODL_USE	Instruct the system on which phase templates to display when entering a change request for a specific business unit.

Phase Page

Use the Phase page (RG_UD_REQ_STATE) to create phases.

These phases appear in the Phase drop-down list box on the Phase Template page.

Navigation:

Set Up CRM > Product Related > Change Management > Change Request Phase Table

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

Phase

SetID SHARE

Phase

Personalize | Find | |

First 1-10 of 10 Last

*Phase	*Description			
APPR	Approved			
CHPL	Change Planning			
DEV	In Development			
HOLD	On Hold			
IMPL	Implementation			
PLAT	Platform Test			
POST	Post Mortem Review			
PROP	Proposed			
RE VW	In Review			
TEST	In Test			

Add New Phase

* Required Field

Phase

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

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

Task Group Template Page

Use the Task Group Template page (RB_TSK_GRP_TPL) to define task group templates.

You associate a task group template to a phase on the Phase Template page.

Navigation:

Set Up CRM > Common Definition > Task Management > Task Group Template > Task Group Template

This example illustrates the fields and controls on the Task Group Template page.

Task Group Template

Task Group

Task Group Template

REVIEW

☒ Active

Clone

Application Usage

Change Management

*Description

Review Change

Task Types

Personalize | Find | First 1-3 of 3 Last

Type

Duration

*Task Type	*Priority	*Subject	Task Owner	Assigned To	Location	Description		
Meeting	Medium	Review Meeting				Description		
Change Activ	Medium	Follow up Action				Description		
Change Activ	Medium	Close Request				Description		

Modified 03/11/2004 10:44AM PST SAMPLE

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

Field or Control	Description
Start Use Code	Select from these values: <i>Current Phase Start:</i> Task start date is equal to the current phase start date. <i>Next in Sequence:</i> Task start date is equal to the prior task’s end date. <i>Prior Phase Start:</i> Task start date is equal to the previous phase start date. <i>Prior Task Start:</i> Task start date is equal to the prior task start date.

Phase Template Page

Use the Phase Template page (RG_UD_PHS_MODEL) to create the phase template.

Identify the phases and the phases' task group templates that you want to associate with the phase template.

Navigation:

Set Up CRM > Product Related > Change Management > Phase Template > Phase Template

This example illustrates the fields and controls on the Phase Template page.

Phase Template

SetID ITHD1

*Template ID MODEL1 *Description E-mail Server Replacement

*Long Description E-mail Server Replacement

Phases

- Assessment
- Approval
- Preparation
- Scheduling
- Implementation
- Review

Phase Find | View All First 1 of 6 Last

*Phase Assessment *Status New

Days 2 Hours

Last Modified 04/30/2004 3:30PM JDILLON

Template Phase Tasks Find | View All | First Last

Task Group Template ID	Last Modified	Modified By
Assess Request	03/11/2004 10:47AM	SAMPLE

* Required Field

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

Phase Template Use Page

Use the Phase Template Use page (RG_UD_PHS_MODL_USE) to instruct the system on which phase templates to display when entering a change request for a specific business unit.

Navigation:

Set Up CRM > Product Related > Change Management > Phase Template Use > Phase Template Use

This example illustrates the fields and controls on the Phase Template Use page.

Phase Template Use

SetID ITHD1

Personalize | Find | First 1 of 1 Last

*Template Use ID	*Start Date	End Date	Request Type	Sub Type	Priority	*Template ID
EMAIL-SERVER	03/11/2004		HARD	SERV	HIGH	MODEL1

Add New Phase Template Use

* Required Field

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

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

Field or Control	Description
Template Use ID	Enter the name of the template that you set up on the Task Group Template page (select Set Up CRM > Common Definitions > Task Management > Task Group Template).
Start Date and End Date	Use the start and end dates to activate or inactivate a given phase template use row. For example, if you wanted to create another row that loaded a different template ID based on the same type, sub type, and priority, you could give the MODEL3A row an end date and then insert a new row with the same type, sub type, and priority but with a new template ID.
Request Type	Select the type of change request that you want the system to look for on the Change Request page.
Sub Type	Select the subtype that you want the system to look for on the Change Request page.
Priority	Select the priority that you want the system to look for on the Change Request page.
Template ID	Select the template ID that you want the system to use on the change request.

Setting Up the Task Type Role Map

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

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

Page Used to Set Up the Task Type Role Map

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Task Type Role Map Page	RG_UD_TSK_ROLE	Create one-to-one mapping between task types and roles in Change Management.

Task Type Role Map Page

Use the Task Type Role Map page (RG_UD_TSK_ROLE) to create one-to-one mapping between task types and roles in Change Management.

Navigation:

Set Up CRM > Product Related > Change Management > Task Type Role Map

This example illustrates the fields and controls on the Task Type Role Map page.

Task Type Role Map

SetID ITHD1

Task Type Role Map		Personalize Find  	First  1-4 of 4  Last
*Task Type	*Role	Assign All Members of Group	Datetime Added
Change Activity	Change Owner	☒	 
Appointment	Change Administrator	☒	 
Appointment	Change Tester	☐	 
Meeting	Change Approval Board	☒	 

Add New Task Type Role Map

* Required Field

Task Type Role Map

<i>Field or Control</i>	<i>Description</i>
Task Type	Select a task type. Task types are set up in Task Management under Set Up CRM > Common Definitions > Task Management > Task Type. They enable users to categorize tasks.
Role	Select a management role. Roles, which are implemented using PeopleTools security, provide the assignment engine with the ability to select and assign all or one member of a provider group that has its role mapped to a task type for tasks that are associated with a change request. Note: Only security roles are listed: role queries are not permitted here.
Assign All Members of Group	Select if you want all members of a provider group to be associated with a particular task type.
Add New Task Type Role Map	Click this button to add a new row to the Task Type Role Map section.

Setting Up PeopleSoft Quality Management

Understanding PeopleSoft Quality Management Business Units

PeopleSoft Quality Management business units enable you to organize defects and fixes to correspond with distinct operational entities within your business. Segmenting your operation by business units facilitates filtering and reporting functionality. Each quality management business unit is also linked to a Change Management business unit and a Call Center business unit.

Defining PeopleSoft Quality Management Business Units

To define PeopleSoft Quality Management business units, use the Quality Definition (RQ_BUS_UNIT_TBL) component.

This topic discusses how to define PeopleSoft Quality Management business units.

Page Used to Define PeopleSoft Quality Management Business Units

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Quality Definition Page</u>	RQ_BUS_UNIT_TBL	Define PeopleSoft Quality Management business units.

Quality Definition Page

Use the Quality Definition page (RQ_BUS_UNIT_TBL) to define PeopleSoft Quality Management business units.

Navigation:

Set Up CRM > Business Unit Related > Quality Definition

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

Quality Definition

Business Unit EAST

***Description** Eastern Region 

***Short Description** East ***Default SetID** APP01 

***Currency Code** USD  US Dollar

Call Center Business Unit US200 

Change Business Unit US200 

Create Business Unit

Field or Control	Description
Business Unit	Displays the business unit abbreviation that you selected or entered before you accessed this page.
Default SetID	Select the default setID that you want to associate with the business unit. Note: The system displays this field only when you define a new business unit that has not already been defined elsewhere within the PeopleSoft CRM system.
Currency Code	Select the default monetary unit in which you conduct transactions in this business unit.
Call Center Business Unit	Select the call center business unit that you want to associate with this PeopleSoft Quality Management business unit.
Change Business Unit	Select the change management business unit that you want to associate with this PeopleSoft Quality Management business unit.
Create Business Unit	Click to save and create the new business unit. Clicking this button is the same as clicking the Save button. Note: The system displays this button only when you define a new business unit that has not already been defined elsewhere within the PeopleSoft CRM system.

Setting Up User Codes

To set up user codes, use the Defect Relationship Types (RQ_RELATION_TYPE), Defect Causes (RQ_UD_DEF_SUSPEC), Defect Symptoms (RQ_UD_DEF_SYMPTM), Defect Status State (RQ_UD_ST_REASON), Defect Status State Reason (RQ_UD_ST_ST_RSN), Defect Status (RQ_UD_ST_STATUS), and Status Combinations (RQ_UD_STAT_COMBO) components.

This topic discusses how to set up user codes.

Pages Used to Set Up User Codes

Page Name	Definition Name	Usage
<u>Defect Symptoms Page</u>	RQ_UD_DEF_SYMPTM	Define defect symptom codes to provide consistent problem symptom descriptions and to facilitate data entry.
<u>Defect Causes Page</u>	RQ_UD_DEF_SUSPEC	Define defect cause codes to provide consistent potential problem cause descriptions and to facilitate data entry.
<u>Defect Status Page</u>	RQ_UD_ST_STATUS	Define defect status codes.
<u>Defect Status State Page</u>	RQ_UD_ST_REASON	Define status states to describe defect status more specifically.
<u>Defect Status State Reason Page</u>	RQ_UD_ST_ST_RSN	Define status-state reason codes to explain why a defect is in a particular status state.
<u>Status Combinations Page</u>	RQ_UD_STAT_COMBO	Define status-state combinations to control permissible transitions.
<u>Defect Relationship Types Page</u>	RQ_RELATION_TYPE	Define defect relationship types to describe dependencies and relationships among defects.

Defect Symptoms Page

Use the Defect Symptoms page (RQ_UD_DEF_SYMPTM) to define defect symptom codes to provide consistent problem symptom descriptions and to facilitate data entry.

Navigation:

Set Up CRM > Product Related > Quality Management > Defect Symptoms > Defect Symptoms

This example illustrates the fields and controls on the Defect Symptoms page.

Defect Symptoms

SetID SHARE

Defect Symptoms

Personalize | Find |

First 1-10 of 10 Last

*Symptom	*Description			
01	Operating System Crash			+ -
02	Program Hang-Up			+ -
03	Program Crash			+ -
04	I: Correct input not accepted			+ -
05	I: Wrong input accepted			+ -
06	I: Descr incorrect/missing			+ -
07	I: Params Incomplete/missing			+ -
08	O: Wrong format			+ -
09	O: Incorrect result/data			+ -
10	O: Incomplete/missing			+ -

* Required Field

Note: The system provides sample field values. You can configure these codes to match product offerings or meet business objectives.

Defect symptom codes describe common symptoms that your customers might experience. For example, when a faulty motherboard causes a computer to crash, the symptom is the crash.

Field or Control	Description
Symptom and Description	Enter a unique code and description that represent the defect symptom.

Defect Causes Page

Use the Defect Causes page (RQ_UD_DEF_SUSPEC) to define defect cause codes to provide consistent potential problem cause descriptions and to facilitate data entry.

Navigation:

Set Up CRM > Product Related > Quality Management > Defect Causes > Defect Causes

This example illustrates the fields and controls on the Defect Causes page.

Defect Causes

SetID SHARE

Defect Causes Personalize Find 1-9 of 9 First Last

*Suspected Cause	*Description			
01	Product SW/DB			+ -
02	Product HW			+ -
03	Test SW			+ -
04	Test HW			+ -
05	Documentation			+ -
06	Interface			+ -
07	Operator Error			+ -
08	Enhancement			+ -
09	Unknown			+ -

* Required Field

Defect cause codes describe the actual cause of a problem. For example, when a loud squealing noise comes from the bottom of a refrigerator, the actual cause is a bad compressor bearing.

Field or Control	Description
Suspected Cause and Description	Enter a unique code and description that represent the suspected cause of the defect.

Defect Status Page

Use the Defect Status page (RQ_UD_ST_STATUS) to define defect status codes.

Navigation:

Set Up CRM > Product Related > Quality Management > Defect Status > Defect Status

This example illustrates the fields and controls on the Defect Status page.

Defect Status

SetID SHARE

Defect Status Personalize Find 1-2 of 2 First Last

*Status Code	*Description			
CLOS	Closed			+ -
OPEN	Open			+ -

* Required Field

Defect status codes describe the defect's most fundamental status in the problem resolution (fix) cycle. The values *OPEN* and *CLOS* (closed) are delivered with the system. Add additional values as required; however, the delivered values should be adequate for most needs.

Field or Control	Description
Status Code and Description	Enter a unique four-character code and description that represent the defect status.

Defect Status State Page

Use the Defect Status State page (RQ_UD_ST_REASON) to define status states to describe defect status more specifically.

Navigation:

Set Up CRM > Product Related > Quality Management > Defect Status State > Defect Status State

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

Defect Status State

SetID SHARE

Defect Status State Personalize | Find | First 1-10 of 10 Last

*Status Code	*State	*Description				
Closed ▼	DFD	Deferred				
Closed ▼	FXD	Fixed				
Closed ▼	NEV	Do Not Fix				
Closed ▼	WTD	Withdrawn				
Open ▼	DEF	To Defer				
Open ▼	TFIX	To Fix				
Open ▼	TRCK	To Track				
Open ▼	TST	To Test				
Open ▼	UASN	Unassigned				
Open ▼	UNVR	Unverified				

* Required Field

Status states define the defect's status in the resolution process more specifically than status codes. For example, when you close an enhancement request, you may do so because you have completed the process or because you decided not to enhance the product as requested. Each status state is linked to a valid status and is available on the Defect page when the corresponding status is chosen.

Field or Control	Description
Status Code	Select the description of the defect's status in the resolution process. Delivered status options are: <i>Closed</i> and <i>Open</i> . Define status codes on the Defect Status page.
State and Description	Enter a unique code of up to four characters and a description to represent the status state.

Defect Status State Reason Page

Use the Defect Status State Reason page (RQ_UD_ST_ST_RSN) to define status-state reason codes to explain why a defect is in a particular status state.

Navigation:

Set Up CRM > Product Related > Quality Management > Defect Status State Reason > Defect Status State Reason

This example illustrates the fields and controls on the Defect Status State Reason page.

Defect Status State Reason

SetID SHARE

Defect Status State Reason Personalize | Find | 1-69 of 69 First Last

*Status	*State	Reason	*Description		
Closed	Deferred	DSL	Design Limitation		
Closed	Deferred	ENH	Enhancement		
Closed	Deferred	INT	Intermittent		
Closed	Deferred	LOI	Low Impact		
Closed	Deferred	LOP	Low Priority		
Closed	Deferred	LOS	Low Severity		
Closed	Deferred	NOP	Not Our Product		
Closed	Deferred	POS	Post Ship		
Closed	Deferred	TMC	Too Many Changes		
Closed	Fixed	NA	Not Applicable		
Closed	Do Not Fix	NWE	Not Worth The Effort		
Closed	Do Not Fix	TMC	Too Many Changes		
Closed	Do Not Fix	TMS	Too Many Side Effects		
Closed	Withdrawn	ASD	As Designed		
Closed	Withdrawn	CNR	Cannot Reproduce		

* Required Field

Use the **Reason** field to describe why a defect resolution has a particular status and state. One status-state combination might have several reasons. For example, a defect may be set with a status state of *Closed* - *Do Not Fix* because the product is no longer supported or because you have determined that the defect complaint should really be an enhancement request. Each status-state reason is linked to a status and state combination and is available on the Defect page when a user chooses the corresponding status and state.

Field or Control	Description
Status	Select the description of the defect's status in the resolution process. Delivered status options are: <i>Closed</i> and <i>Open</i> . Define status codes on the Defect Status page.
State	Select the state that you want to associate with the defect status. States define the defect's status in the resolution process more specifically than status codes. Select either <i>Deferred</i> , <i>Do Not Fix</i> , <i>Fixed</i> , or <i>Withdrawn</i> .
Reason and Description	Enter a code of up to three characters and a description to further explain the reason for the status-state combination.

Status Combinations Page

Use the Status Combinations page (RQ_UD_STAT_COMBO) to define status-state combinations to control permissible transitions.

Navigation:

Set Up CRM > Product Related > Quality Management > Status Combinations > Status Combinations

This example illustrates the fields and controls on the Status Combinations page.

Status Combinations

SetID SHARE

Status Combinations

Personalize | Find |

First 1-18 of 18 Last

*Status Code From	*State Code From	*Status Code To	*State Code To		
Open	To Defer	Closed	Deferred	+	-
Open	To Defer	Closed	Do Not Fix	+	-
Open	To Fix	Closed	Do Not Fix	+	-
Open	To Fix	Closed	Withdrawn	+	-
Open	To Test	Closed	Fixed	+	-
Open	To Test	Closed	Do Not Fix	+	-
Open	To Test	Closed	Withdrawn	+	-
Open	Unassigned	Closed	Do Not Fix	+	-
Open	Unassigned	Closed	Withdrawn	+	-
Open	To Fix	Open	To Defer	+	-
Open	To Fix	Open	To Test	+	-
Open	To Fix	Open	Unassigned	+	-
Open	To Test	Open	To Defer	+	-
Open	To Test	Open	To Fix	+	-
Open	To Test	Open	Unassigned	+	-

* Required Field

As a defect or enhancement request moves thorough the resolution process, you want to change the status-state combination to reflect its progress. However, certain changes do not make sense. For example, if an enhancement request's status is *Open - Deferred*, you should not change it to *Closed - Fixed* without passing through the verify, fix, and test stages.

Use this page to control which transitions are permissible. Define combinations for all possible transitions, including reverse transitions. For example, if a software fix fails in testing, it must be returned to the developer. In this case, you need a valid status combination that allows the change to go from *Open - Fixed* back to *Open - To Test* in development.

Field or Control	Description
Status Code From	Select the description of the beginning status code from the codes that you defined on the Defect Status page.
State Code From	Select the description of the beginning state code from the codes that you defined on the Defect Status State page.
Status Code To	Select the description of the new (after the combination change) status code from the codes that you defined on the Defect Status page.

Field or Control	Description
State Code To	Select the description of the new state code after the change from the codes that you defined on the Defect Status State page.

Defect Relationship Types Page

Use the Defect Relationship Types page (RQ_RELATION_TYPE) to define defect relationship types to describe dependencies and relationships among defects.

Navigation:

Set Up CRM > Product Related > Quality Management > Defect Relationship Types > Defect Relationship Types

This example illustrates the fields and controls on the Defect Relationship Types page.

Sometimes, two or more defect cases are related to one another, or the solution to a defect may be dependent on the solution to a previous defect. Defect relationship types describe these dependencies. All defect relationships fall into the general categories of hierarchical or equivalent.

An *equivalent relationship* is two or more defects having the same cause. One fix resolves multiple cases. A *hierarchical relationship* is an instance when one case cannot be resolved without first resolving another.

Field or Control	Description
Relationship Type	Enter a unique code up to five characters to represent the relationship type.
Parent Label and Child Label	If you are defining a hierarchical relationship, enter a label value for both the parent and the child defects. These labels are used on the Related Defects page to describe the relationship.

Field or Control	Description
Equivalent Label	If you are defining an equivalent relationship, enter a label value to appear on all related cases.
Hierarchical	Clear this check box to define an equivalent relationship type.

Setting Up Products

To set up products, use the Component Definitions (RQ_COMP_DEFN), Component Versions (RQ_PROD_VERS), and Component Types (RQ_UD_COMP_TYPE) components.

This topic provides an overview of products and components and discusses how to set up products.

Pages Used to Set Up Products

Page Name	Definition Name	Usage
Component Types Page	RQ_UD_COMP_TYPE	Define general component types.
Component Definition Page	RQ_COMP_DEFN	Define product components.
Component Definitions - Relationships Page	RQ_COMP_PAR_LNK	Define parent-child relationships between product components.
Version Page	RQ_PROD_VERS	Define distinct component versions.
Environments Page	RQ_PROD_VERS_ENV	Define version environment details.

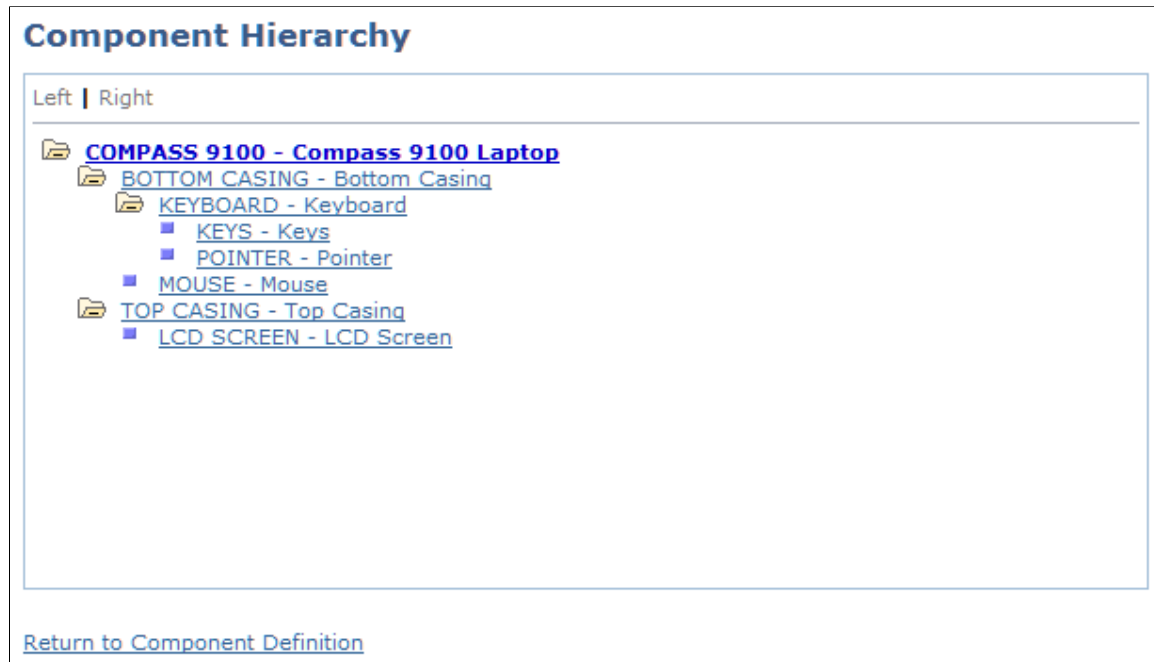
Understanding Products and Components

Generally, every product consists of components, each of which may also consist of subcomponents. You use the Component Type page to break down products into component and subcomponent levels.

You can then combine components and subcomponents in a hierarchical relationship on the Component Definitions page. As changes are made in the combination of components and subcomponents, a different component definition of the product is created and distinguished from all others by a unique version definition. When you select a specific product version while creating a defect record, you can drill down to the correct components and subcomponents that you used to build that particular version.

For example, here is a simple breakdown of a laptop computer's components:

This example illustrates the fields and controls on the Example of laptop component hierarchy.



At the least, a laptop computer is made up of a bottom casing and a top casing. One of the bottom casing's subcomponents is the keyboard, which is made up of several individual keys. The top casing has a liquid crystal display (LCD) screen as one of the subcomponents. As you can see, this breakdown could go on for many levels.

Suppose that you manufacture laptops, and you want to offer an improved LCD screen. The laptops that include the improved screen are a new version. As you create the version's component definition, the only change is the LCD screen, but that change means that the hierarchy of components is different. By attaching the new component definition to a new and unique component version, you are assured that the correct LCD screen is available as you drill down on the product components.

Note: Product definitions can become quite complex. Consult with product experts to obtain the information needed to complete the following pages.

Component Types Page

Use the Component Types page (RQ_UD_COMP_TYPE) to define general component types.

Navigation:

Set Up CRM > Product Related > Quality Management > Component Types > Component Types

This example illustrates the fields and controls on the Component Types page.

Component Types

SetID: ITHD1

Personalize | Find | | First | 1-9 of 9 | Last

*Component Type	*Type Description	*Production Description			
BMCS	Bottom Casing	Laptop		+	-
CARI	Carriage	Printer Carriage		+	-
KEYS	Keys	Laptop		+	-
KYBD	Keyboard	Laptop		+	-
LCDS	LCD Screen	Laptop		+	-
LPTP	Laptop	Laptop		+	-
MOUS	Mouse	Mouse		+	-
TPCS	Top Casing	Laptop		+	-
TWR4	Tower 4	Tower Four		+	-

* Required Field

The component type is the most basic definition of a component. This general description can be used in multiple component definitions. For example, you might define a component type that represents all keyboards, or you might narrow the definition to only keyboards for laptops.

Field or Control	Description
Component Type	Enter a unique code that represents the component specifically defined by the combination of the type and production descriptions. This field is limited to four characters.
Type Description	Briefly describe the component. This description appears in the component hierarchy display and on the main Defect page. You can also use it to describe the same component in multiple component definitions. For example, all laptop computers have a keyboard. The keyboards for each laptop model may differ, but they all have a keyboard of some type. The type description <i>keyboard</i> is a general description of the component that is used for all models.
Production Description	Briefly describe the product to which the component belongs. This field is informational and provides a means of further distinguishing a type description by associating it with a particular product or by adding further defining characteristics. For example, you can distinguish between a laptop keyboard and a desktop keyboard by changing the production description.

Component Definition Page

Use the Component Definition page (RQ_COMP_DEFN) to define product components.

Navigation:

Set Up CRM > Product Related > Quality Management > Component Definitions > Component Definition

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

The component definition is a more specific description of a particular component. For example, you might have a laptop keyboard with gray keys and another with black keys. The component definition enables you to distinguish between the two keyboards.

The component definitions also show the level at which subcomponents are linked to other components in a child-to-parent relationship, creating a hierarchy that culminates in the product component definition.

Field or Control	Description
Name	Enter the component name. This name is informational only and can be the same as the component ID or type description.
Component Hierarchy	Click this link to view the hierarchy of components.
Type	Select the type of component that you described in the Name field.
Class	Select a component class description. Values are: <i>Doc</i> (documentation), <i>HW</i> (hardware), <i>Service</i> , <i>Test</i> , <i>Third Party Doc</i> (third-party documentation), <i>Third Party HW</i> (third-party hardware), <i>Third Party SW</i> (third-party software), and <i>Third Party Service</i> .

Component Definitions - Relationships Page

Use the Component Definitions - Relationships page (RQ_COMP_PAR_LNK) to define parent-child relationships between product components.

Navigation:

Set Up CRM > Product Related > Quality Management > Component Definitions > Relationships

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

Component DefinitionRelationships

Component IDKeyboardNameKeyboard

Parent ComponentsPersonalizeFindView All1 of 1FirstLast

*Parent ID	Name	Type		
BOTTOM CASING	Bottom Casing	Bottom Casing	+	-

Child ComponentsPersonalizeFindView All1-2 of 2FirstLast

*Child ID	Name	Type		
KEYS	Keys	Keys	+	-
POINTER	Pointer	Keys	+	-

* Required Field

Component relationships define the component hierarchy. In the example of the laptop computer, the bottom casing includes the keyboard assembly, which is made up of individual keys. Thus, the bottom casing is the parent to the keyboard assembly, which, in turn, is the parent to the keys.

Field or Control	Description
Parent ID	Select the parent component to which the defined component is related.
Name and Type	Displays the name and type of the selected parent component.
Child ID	Select the child component to which the defined component is related.
Name and Type	Displays the name and type of the selected parent component.

Note: To link components, both the component being linked and the component to which you are linking must have valid component definitions. If the component to which you are linking does not have a definition, you can create the definition by clicking the **Component Definitions** button.

To view the component relationship, return to the Component Definition page. Click the **Component Hierarchy** link to access the Component Hierarchy page. Click the **Refresh** button to display newly added components.

Version Page

Use the Version page (RQ_PROD_VERS) to define distinct component versions.

Navigation:

Set Up CRM > Product Related > Quality Management > Component Versions > Version

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

Version

Environments

Version

Component ID

TOSHIBA 8800

Name

Toshiba Tecra 8800 Laptop

Production ID

VERSION 1

Type

Toshiba Tecra

Main Information

*Version

Version 1

*Product

Custom Configured Computer

Phase Introduced

Complexity

Lines Changed

Details

Predecessor ID

Successor ID

Date Created

12/26/2001 1:46PM PST Quality Manager

Last Modified

12/26/2001 1:46PM PST Quality Manager

Class

HW

Production date

Introduced Date

Lines Added

Lines Deleted

Responsible Parties

Personalize

Name

*Type

Robert Hall

Quality Manager

Kay Adams

Quality Developer

Brian McGrath

Quality Analyst

Thomas Hagen

Quality Development Manager

* Required Field

Products consist of components. When one or more of these components changes, you refer to the changed product as a new *version*. PeopleSoft Quality Management enables you to uniquely identify different product versions by defining different component versions. Each version represents a unique product component definition.

Note: When creating a new value, the Production ID is in a free form text field. The Production ID is the link between the product and the version.

Main Information

Field or Control	Description
Version	Enter a word or phrase to describe the version build.
Product	Select the product that is associated with the component.

Field or Control	Description
Phase Introduced	Select the product development phase in which this component version was introduced. Values are: <i>Alpha</i> , <i>Analysis/Design</i> , <i>Beta</i> , <i>Concept</i> , <i>Implementation</i> , <i>Maintenance</i> , <i>Production</i> , <i>Requirements</i> , and <i>Retirement</i> .
Complexity	Select the level of complexity that best represents what it would take to fix a defect in the component.
Production Date and Introduced Date	Enter the dates the product was first produced and introduced to the market.
Lines Added , Lines Changed , and Lines Deleted	Enter the lines of code that were added, changed, or deleted in this version. These fields apply to software code.
Predecessor ID and Successor ID	Enter a predecessor and successor version, if applicable.

Responsible Parties

Generally, *responsible parties* are the team members charged with maintaining a product's quality and components. Responsible-party information entered here automatically transfers to the Defect page when the version is selected on that page.

Field or Control	Description
Name	Select the names of responsible parties.
Type	Select the responsible party's role.

Environments Page

Use the Environments page (RQ_PROD_VERS_ENV) to define version environment details.

Navigation:

Set Up CRM > Product Related > Quality Management > Component Versions > Environments

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

The screenshot displays the 'Environments' page for a specific component version. The 'Version' section at the top identifies the component as 'TOSHIBA 8800' with the name 'Toshiba Tecra 8800 Laptop' and production ID 'VERSION 1'. The 'Supported Environments' section below contains a table with columns for 'Label', 'OS', 'Environment', 'Network', 'Details', 'Support Type', 'OS Version', 'Platform', and 'UI'. The 'Label' field is set to 'Win NT', 'OS' to 'Windows NT', 'Environment' to 'Pentium III', 'Network' to 'Windows 98', and 'UI' to 'Supported'. The 'Date Created' and 'Last Modified' fields both show '09/29/2014 2:28AM PDT'.

Component version environments relate only to software products and describe technical details needed to identify problems and fixes. Environment information entered here automatically transfers to the Defect page when the corresponding version is selected. This page is needed for software products only.

Field or Control	Description
Label	Describe the component version environment.
Support Type	Select whether the software version has service support.
OS (operating system) and OS Version (operating system version)	Select the software operating system and version.
Environment, Platform, and Network	Select the database management system environment (for example, Microsoft SQL Server or Oracle), hardware platform, and network protocol within which the software operates.
UI (user interface)	Select the user interface that the software uses.

Defining EIP Options for Integration to PeopleSoft or Oracle E-Business HCM

Understanding the Integration Between PeopleSoft CRM and PeopleSoft or E-Business HCM

This topic discusses:

- Initial Data Load for integration with E-Business HCM.
- EIP message process.
- Request message.
- Response message.
- Inactive worker data.

Initial Data Load for Integration with E-Business HCM

Part of the initial setup for CRM HelpDesk for Human Resources involves synchronizing certain data between the CRM and HCM systems. When integrating with E-Business HCM, data for department, job code, location, person, and workforce must be loaded from the E-Business system into flat files. This data is then loaded into the CRM system using batch processes to read each of the flat files.

EIP Message Process

All search information is stored in the PeopleSoft CRM database. When an agent accesses the 360-Degree View page for a specific employee, a secured synchronous request is sent to PeopleSoft or E-Business HCM, depending on which system is the source of employee information.

When PeopleSoft or E-Business HCM validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by a runtime synchronous request and response message. The structure of the request and response message differs depending on which HCM is being accessed.

Each time an agent accesses an employee record from the 360-Degree View search page, the system triggers a runtime EIP. For security reasons, the information is not saved to the PeopleSoft CRM database.

See “Understanding the 360-Degree View” (Application Fundamentals).

Request Message

The system sends a secured synchronous request message from PeopleSoft CRM to the PeopleSoft or E-Business HCM. The system validates the requestor's information before processing the request.

When integrating to PeopleSoft HCM, the request message contains this information:

- Authentication cookie.

A PeopleSoft-provided authentication token for the purpose of single sign on. PeopleSoft CRM transfers this cookie to PeopleSoft HCM so that it can get a valid user. The system then uses the cookie to validate security access in PeopleSoft HCM before it provides service.

- EmplID (employee ID) from the 360-Degree View search page.
- As of date.

The date that is passed for effective-dated components in PeopleSoft HCM. The default value is *%date* (today's date). The system can use this date to query information from past dates.

- Language.

The language that the agent uses to log on to the application. The default value is *(%language)*. PeopleSoft HCM retrieves information based on the language code in the request for internationalization support.

When integrating to E-Business HCM, the request message contains this information:

The request message header contains these fields:

- Responsibility Name.

The value for this is defined on the Call Center page of the User Preferences.

- Responsibility Application Name.

The value for this is defined on the Call Center page of the User Preferences.

- Security Group.

The value for this is defined on the Call Center page of the User Preferences.

- Language.

- Organization ID.

The value for this is defined on the Call Center page of the User Preferences.

The request message input parameters section includes these fields:

- EBS Person ID.

Note: The EBS Person ID is not the same as the PeopleSoft Person ID.

- Effective Date.

The PeopleSoft system delivers these sections as options on the Define HCM Sections page. You can select or clear these options in the installation setup for your organization as a whole:

- Absence
- Benefits
- Direct Reports
- Job and Position Summary
- Pay Summary

Response Message

The synchronous response from PeopleSoft or E-Business HCM contains a response to the information provided in the request. When integrating with PeopleSoft HCM, the system displays all error messages provided by PeopleSoft HCM (including the denial of access).

Note: You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft or E-Business HCM as well as grant security access to the information and enable single sign on in PeopleSoft or E-Business HCM. Depending on the setup in PeopleSoft or E-Business HCM, a user ID may not have access to all of the information. In that case, the response returned from the Human Resource Management system will contain an error message, such as *Secured*, for certain information.

Inactive Worker Data

You can configure the system to bring inactive worker statuses into PeopleSoft CRM. The HR HelpDesk Worker 360–Degree View enables you to search for inactive workers. In addition to *Active* status, PeopleSoft HCM has 11 worker statuses that you can select from on the Worker Statuses to EIP setup page. Options include *Deceased*, *Retired*, and *Leave of Absence*.

Note: When integrating with E-Business HCM, all workers, regardless of status, are retrieved.

Loading Initial Data from E-Business HCM

This topic discusses how to load initial data from E-Business HCM into the CRM system.

Pages Used to Load Initial Data from E-Business HCM

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>EBS HR HelpDesk Data Load Page</u>	RC_EBS_UPLOAD	Load initial data from E-Business HCM flat files.

EBS HR HelpDesk Data Load Page

Use the EBS HR HelpDesk Data Load page (RC_EBS_UPLOAD) to load initial data from E-Business HCM flat files.

Navigation:

Set Up CRM > Install > EBS Data Upload > EBS Data Upload

This example illustrates the fields and controls on the EBS HR HelpDesk Data Load page.

<i>Field or Control</i>	<i>Description</i>
Data to upload	Select the type of data to be loaded from flat file to PeopleSoft CRM system.
File Name	Specify the name of the flat file containing data from the E-Business HCM that is to be loaded into the PeopleSoft CRM system.
Run	Click this button to initiate the batch process that will load the data from the specified file.

Use this page to load data for department, job code, location, person, and workforce from the E-Business HR system. Each of the specified types of data must be loaded sequentially into the PeopleSoft CRM system. Note that the data to be loaded for each batch process must be specified in a flat file.

Note: For more information on the E-Business HCM initial data load process, consult your PeopleSoft CRM Installation Guide.

Defining EIP Options

This topic discusses how to define EIP options.

Define HCM Sections Page

Use the Define HCM Sections page (RB_TD_HCM_CNTRYSEC) to activate and deactivate the subscription options by country, that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources.

Navigation:

Set Up CRM > Common Definitions > 360-Degree View > Define HCM Sections > Define HCM Sections

This example illustrates the fields and controls on the Define HCM Sections page.

Define HCM Sections

Country USA United States

360-Degree View Section

Sections	Enabled
Absence	☐
Benefits	☒
Direct Reports	☒
Job and Position Summary	☒
Job and Position Summary GP	☐
Job and Position Summary NA	☒
Pay Summary	☒
Pay Summary GP	☐
Pay Summary NA	☒
US Federal Compensation	☐
US Federal Employment	☐

Save
 Return to Search
 Notify
 Add
 Update/Display

Select the check boxes associated with the sections that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources. You can define HCM sections for each country where you process payroll.

Note: *GP* stands for *Global Payroll*; *NA* stands for *North American Payroll*.

Related Links

“Understanding 360-Degree View Setup” (Application Fundamentals)

Worker Statuses to EIP Page

Use the Worker Statuses to EIP page (RB_WRKR_EIP_OPN) to make inactive worker statuses available in PeopleSoft CRM.

Navigation:

Set Up CRM > Common Definitions > Integration Rules > Integration Defaults > Worker Statuses > Worker Statuses

This example illustrates the fields and controls on the Worker Statuses to EIP page.

Worker Statuses to EIP

Personalize | Find |   First  1-12 of 12  Last

Select	Employee Status	Employee Status
☒	A	Active
☐	D	Deceased
☐	L	Leave of Absence
☐	P	Leave With Pay
☐	Q	Retired With Pay
☐	R	Retired
☐	S	Suspended
☐	T	Terminated
☐	U	Terminated With Pay
☐	V	Terminated Pension Pay Out
☐	W	Short Work Break
☐	X	Retired-Pension Administration

☒ Select All ☐ Clear All

While integrating with PeopleSoft HCM, use this settings to define which workers status to be brought into CRM system. Select all of the check boxes associated with the worker statuses that you want to make available in PeopleSoft HelpDesk for Human Resources.

The system creates workers with the statuses that you selected. This information is available to agents on both the PeopleSoft HelpDesk for Human Resources Case search page and the PeopleSoft HelpDesk for Human Resources 360-Degree View page.

Viewing HR-Related Payroll Information on the 360-Degree View Page

This topic discusses how to view HR-related payroll information on the 360-Degree View page.

Page Used to View HR-Related Payroll Information on the 360-Degree View Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
360-Degree View Page	RB_TD_AGENT_VIEW	View HR data for workers (employees) that comes over to the CRM from the PeopleSoft or E-Business HCM.

Viewing the HR HelpDesk Worker 360-Degree View Page

From the 360-Degree View page in PeopleSoft HelpDesk for Human Resources you can view fields and country-specific information for the Job and Position Summary, Pay Summary, and Benefits sections.

The PeopleSoft system also provides the ability to show the final paycheck for a terminated or retired employee on the 360-Degree View page.

Using Active Analytics Framework (AAF), functional users can create policies that identify and mark HelpDesk for Human Resources cases as secured when users save cases and the terms of the condition are met. To accomplish this, the system displays a **Secured Case** check box next to the **Resolved by First Contact** check box on the Configure Call Center Case Update Action policy page.

The 360-Degree View page also enables agents to distinguish between a person's paycheck and benefits as they relate to the person's assignments and relationship to the company. To enable help desk agents using the HelpDesk for Human Resources application to view IT help desk cases that are associated to assets for a given worker, the system displays a Help Desk Cases node on the HR HelpDesk Worker 360-Degree View page.

Fields in the Authorized Cases section on the 360-Degree View page are laid out to better reflect the importance of the fields to an agent. The system provides users with the ability to access a worker's historical, current, and future job record on the Worker component.

So that agents can only access the information that they have permission to view, PeopleSoft extended the 360 EIP to include row-level security. Rather than maintaining a second layer of security in the CRM setup pages, you only have to set up this security once. Using the Configure Roles page, you have the ability to make HR sections and subsections configurable in the HR HelpDesk Worker 360-Degree View page.

Related Links

“Understanding AAF” (Automation and Configuration Tools)

“Understanding 360-Degree View Setup” (Application Fundamentals)

Viewing Job and Position Summary

The Job and Position Summary section provides agents with a summary of the caller's job data to answer common questions about an employee's job title, location, or status.

This table describes some of the common fields that are shown in the Job and Position Summary section:

Common Fields	Description
As Of Date	Enables agents to see data for different dates. After a search, when the EIP is instantiated for the first time, the system passes the current date to the As Of Date field. All the data that appears is based on the current date. If the agent wants to see past-dated data, he or she can change the As Of Date field and click Go . This action re-instantiates the EIP.
Show Job Details for	The values in this drop-down list box come from the HD_360_XREF_WK record, which is included in the HD_360_RESPONSE_SYNC message. All the unique job codes from the response message are added to the Show Job Details for field. When more than one job code is available for the person, the system adds the <i>View All</i> value to the drop-down list box. Selecting the <i>View All</i> value displays all the data for the person in the Job and Position Summary, Pay Summary, and Benefits sections. The system hides the field if the person has only one job. Job and Position Summary, Pay Summary and Benefits are filtered when the agent selects any job code. All the records that take part in the filtering are tagged with the job code. This field only appears when integrating with PeopleSoft HCM.
Work Period	The time period during which the standard hours must be completed. This field only appears when integrating with PeopleSoft HCM.
Company	A high-level entity to which all departments roll up. This field appears here only when integrating with PeopleSoft HCM.
Establishment	Organizational entities that define physical locations and specific attributes associated with the establishment. This field only appears when integrating with PeopleSoft HCM.
Labor Agreement	A field that is defined by customers and identify a specific labor contract. This field only appears when integrating with PeopleSoft HCM.

Common Fields	Description
Employee Category	A class of employees as defined in the labor agreement.
Person Type	A blend of the Person Organization (PER_ORG) and Person of Interest Type (POI_TYPE) fields in PeopleSoft HCM. The Job and Position Summary section on the 360-Degree View page subscribes to the Person Organization and Person of Interest Type fields in the HelpDesk 360 Response Sync Message.

If appropriate, the system automatically hides fields that are not used outside of North America. Some available fields are commonly used only in France, such as **Paid Hours** and **Paid Work Period**.

Here is an example of the Job and Position Summary (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Job and Position Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

The screenshot shows the 'Job and Position Summary' section for a worker in France. At the top, there is a date filter 'As Of Date' set to 11/06/2014 with a 'Go' button. The section is divided into two columns of fields. The left column includes Job Code (170085), Date of Hire (01/01/2000), Employment Status (Active), Position, Company (Business Institute - France), Establishment (Paris - Headquarter), Supervisor EmplID (KF0001), Regular/Temporary (Regular), Standard Hours (35.00), Labor Agreement (KF01), Paid Hours (35.00), and Payroll System (Global Payroll). The right column includes Job Description (Assistant-Senior), Person Type (Employee), Employment Status Date (06/01/2008), Business Unit (FRA01), Location (Paris), Department (France Headquarters), Supervisor Name (Maurice Berger), Full/Part Time (Full-Time), Work Period (Weekly), Employee Category (CAD), and Paid Work Period (Weekly). Navigation links 'First', '1 of 1', and 'Last' are visible on the right.

The **Person Type** field (Organizational Relationship) enables agents to distinguish among a contingent worker, employee, or person of interest (POI) in the Job and Position Summary section for each of a worker's jobs in the scroll area.

Here is an example of the Job and Position Summary (United Kingdom) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Job and Position Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

The screenshot shows the 'Job and Position Summary' section for a worker in the United Kingdom. At the top, there is a date filter 'As Of Date' set to 11/06/2014 with a 'Go' button, and a 'Show Job Details For' dropdown menu set to 'View All'. The section is divided into two columns of fields. The left column includes Job Code (120010), Date of Hire (12/15/1995), Employment Status (Active), Position, Company (Business Institute - UK), Establishment, Supervisor EmplID (KG0010), Regular/Temporary (Regular), Standard Hours (25.00), Labor Agreement, and Payroll System (Global Payroll). The right column includes Job Description (Administrator-Human Resources), Person Type (Employee), Employment Status Date (01/01/2011), Business Unit (GBR03), Location (Reading - England), Department (Human Resources), Supervisor Name (Tobi Hoxley), Full/Part Time (Full-Time), Work Period (Weekly), and Employee Category. Navigation links 'First', '1 of 2', and 'Last' are visible on the right.

Here is an example of the Job and Position Summary section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to Oracle E-Business HCM).

This example illustrates the fields and controls on the Job and Position Summary section - HRHD Worker 360-Degree View page (E-Business HCM).

The screenshot shows the 'Job and Position Summary' section of the HRHD Worker 360-Degree View page. It includes a header with 'HR Information' and a sub-header 'Job and Position Summary'. Below the header, there are two columns of fields. The left column contains: Job Code 7, Date of Hire 11/12/2002, Employment Status Active Assignment, Position DIR206.Director, HR East Opera, Organization Human Resources-East, Supervisor EmplID 119, Standard Hours 40.00, Collective Agreement, and Payroll System Vision HR Semi-Monthly. The right column contains: Job Description DIR300.Director, Person Type Employee, Employment Status Date 01/01/2002, Employment Category Fulltime-Regular, Location Boston Mfg Plant 2 used in Ope, Supervisor Name Erickson,Mr. Barry, Work Period Week, and Employee Category. At the top, there is a date selector 'As Of Date' set to 11/06/2014 and a 'Go' button. To the right, there is a 'Show Job Details For' dropdown set to 'View All' and a pagination control 'First 1 of 2 Last'.

This table describes the fields used in the Job and Position Summary section:

Fields in the Job and Position Summary Section	Description
Common fields available when integrating to either PeopleSoft or E-Business HCM	The system displays these fields for all workers: Job Code Job Description Date of Hire Person Type Employee Status Employment Status Date Position Location Supervisor ID Supervisor Name Standard Hours Work Period Employee Category Payroll System

Fields in the Job and Position Summary Section	Description
Common fields available when integrating to PeopleSoft HCM	The system displays these fields for all workers: Business Unit Company Establishment Department Regular/Temporary Full/Part Time Labor Agreement
Common fields available when integrating to E-Business HCM	The system displays these fields for all workers: Employment Category Organization Collective Agreement
U.S. fields available when integrating to PeopleSoft HCM	These fields appear if the worker's regulatory region is USA: FLSA Status FICA Status - Employee Note: The system hides the FLSA Status and FICA Status-Employee fields when the employee is Canadian.
France fields available when integrating to PeopleSoft HCM	These fields appear if the regulatory region is FRA: Paid Hours Paid Work Period

Viewing Pay Summary

The **Pay Summary** section provides an agent with a summary of an employee's last confirmed paycheck. The help desk agent uses the **Pay Summary** section to answer common questions about the caller's net pay, taxes, and withholding amounts.

When integrating with PeopleSoft HCM, the system displays the **Withholding Option** section only for North American Payroll (U.S. and Canada) customers. This section includes the number of withholding allowances, special state tax information, additional percentages withheld, and additional amounts withheld at both the state and provincial and the federal levels.

To enhance PeopleSoft Global Payroll, new common fields as well as new fields for country extensions (U.K. and France) were added. PeopleSoft HCM determines which global fields are sent in the 360 Response message.

Here is an example of the Pay Summary (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Pay Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Pay Summary		First	1 of 1	Last
Company	KF1	Address		
Job Title	Director-Operations	Pay Group KFGMONTHLY		
Payment	03/31/2006	Currency Code EUR		
Period Begin	03/01/2006	Period End 03/31/2006		
Calculation Begin	03/01/2006	Calculation End 03/31/2006		
Run Type	Payroll Run Type			

Here is an example of the Pay Summary (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Pay Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Pay Summary		First	1 of 1	Last
Company	KG1	Address		
Job Title	Manager-Senior	Pay Group GG MNTH CO		
Payment	05/31/2008	Currency Code GBP		
Period Begin	05/01/2008	Period End 05/31/2008		
Calculation Begin	05/01/2008	Calculation End 05/31/2008		
Run Type	IMIS Payroll			

Here is an example of the Pay Summary section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

This example illustrates the fields and controls on the Pay Summary section - HRHD Worker 360-Degree View page (E-Business HCM).

Pay Summary		First	1 of 1	Last
Company	Human Resources-East	Address 5 Park Street Boston MA 02111, USA		
Job Title	DIR300.Director	Pay Group Vision HR Semi-Monthly		
Payment	09/30/2007	Currency Code USD		
Pay Frequency	Semi-Month	Period End 09/30/2007		
Tax Location	M2- Boston	Federal Marital Status Married		
Period Begin		Period End 09/30/2007		
Run Type	Regular Standard Run			

This table describes the fields that represent common fields versus country-specific fields in the **Pay Summary** section:

Fields in the Pay Summary Section	Description
Common fields when integrating to E-Business HCM or for integrating to PeopleSoft HCM Payroll North America and Global Payroll	These fields appear for all: Company Address * Paygroup Job Title Currency Code Note: * Even though Address is not a field commonly used by Global Payroll, it is included to make the common fields line up. It is coded to <i>Not Applicable</i> for Global Payroll.
Fields shown when integrating to E-Business HCM or when integrating to PeopleSoft HCM Payroll North America.	For PeopleSoft HCM, these fields appear only when the employee's Pay System Flag is <i>PNA</i>: Period End * Tax Location Federal Marital Status Pay Frequency Note: * This field must appear for Global Payroll to align with the Period Begin Date field.
Global Payroll-only fields	These fields appear when the employee's Pay System Flag is <i>GP</i>: Period Begin Period End Calculation Begin Calculation End Run Type Note: Calculation begin and end dates represent the first day and the last day of the period for which this payment was calculated. Run Type represents the type of payment (for example, regular pay, bonus, and so on).

Viewing Payment Total

The system also displays the Payment Total section as a subsection of the Pay Summary when the employee's pay summary flag equals Payroll North America (PNA) or Global Payroll (GP). For Global Payroll, the group box label is called **Payment Total** since *paycheck* is not a commonly used term in Europe.

Here is an example of the Payment Total (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Payment Total section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Payment Total		
Description	Current	Annual
Segment Taxable Net	1866.130000	5613.310000
Segment Gross Salary	2286.740000	6860.220000
Segment Payee's contributions	485.480000	1441.520000
Segment Employer's contributio	1208.687500	3603.702500
Urssaf ceiling A of the segmen	1294.500000	3883.500000

Here is an example of the Payment Total (UK) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

Note that Check Total for Payroll North America is relabeled to Payment Total for Global Payroll, and the rows that an agent may see vary based on how you configure your Global Payroll application.

This example illustrates the fields and controls on the Payment Total section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Payment Total		
Description	Current	Annual
Earnings	3100.000000	6200.000000
Tax	620.000000	1240.000000
National Insurance	291.170000	582.340000
Net Pay	2188.830000	4377.660000

Here is an example of the Payment Total section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

This example illustrates the fields and controls on the Payment Total section - HRHD Worker 360-Degree View page (E-Business HCM).

▼ Withholding Options		
Type	Federal	MA
Withholding Allowances	2	1
Special State Tax Info		0
Additional Percent	0.000%	0.000%
Additional Amount	0.00	0.00
Override Tax Amount	0.00	0.00
Override Tax Percent	0.000%	0.000%

▼ Payment Total		
Type	Current	YTD
Total Earnings	6469.31	150805.02
Taxable Gross	6296.53	147694.98
Total Taxes	1251.34	33796.09
Total Deductions	176.93	3184.74
Net Pay	5009.22	113251.43

▼ Payment Total		
Description	Calc Result Value	Annual Total

This table describes the fields used in the **Payment Total** section:

Fields in the Payment Total Section	Description
Description (PeopleSoft HCM) or Type (E-Business HCM) column.	For PeopleSoft HCM, this data appears under the Description column only when the employee's Pay System Flag is <i>PNA</i>: Total Earnings Taxable Gross Total Taxes Total Deductions Net Pay ***** For PeopleSoft HCM, depending on the country, this data appears under the Description column only when the employee's Pay System Flag is <i>GP</i>: Segment Taxable Net (France) Yearly Gross Salary (France) National Insurance (France) Segment Payee's contribution (France) Segment Employer's contribution (France) Urssaf ceiling A of the segment (France) Earnings (UK) Tax (UK) National Insurance (UK) Net Pay (UK)
Current column.	Displays the current amount for the field on the corresponding line under the Description or Type column in the grid.
Annual (PeopleSoft HCM) or YTD (E-Business HCM) column	Displays the annual amount for the field on the corresponding line under the Description or Type column in the grid.

Viewing Absences

With the introduction of Global Payroll to the 360-Degree View, it is common for employees to call the help desk with questions about absence accruals and balances. European countries track more absence types than the U.S. typically tracks.

Furthermore, customers need the ability to tailor the absence section to meet their individual country's needs. PeopleSoft HCM offers absence management as a separate product; therefore, the **Absence** section is a separate section in the 360-Degree View page, and it has no ties to the **Pay Summary** section.

Here is an example of the Absence (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Absence section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Absence		
Description	Entitlement Balance	As of Date
SSP Absence	25.00	03/31/2006

Here is an example of the Absence (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Absence section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Absence		
Description	Entitlement Balance	As of Date
Paid Vacation Days balance	25.00	03/31/2006
Paid Vacation Days entitlement	25.00	03/31/2006

Here is an example of the Absence section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

This example illustrates the fields and controls on the Absence section - HRHD Worker 360-Degree View page (E-Business HCM).

▼ Absence		
Description	Entitlement Balance	As of Date
Vacation PTO	12.00	06/15/2009
Sick Leave	12.00	06/15/2009

Requirements for Absence

Using the 360-Degree View configuration, you can enable or disable the **Absence** section on the 360-Degree View page. When integrating to PeopleSoft HCM, the 360-Degree View page can display the **Absence** section with or without payroll data for both Payroll North America and Global Payroll.

The absence configuration defined in PeopleSoft HCM determines how columns are labeled in the **Absence** grid. You can, however, configure the section name as the terminology varies from country to country (for example, *Absence*, *Leave*, and so on).

The 360-Degree View page subscribes to and displays the following fields:

Field	Description
Description	The description of the absence type (for example, PTO, sick, vacation, and so on).

Field	Description
Entitlement Balance	The grand total, positive or negative, accrued by the worker for the absence type.
As of Date	The date as of which the entitlement balance was last calculated.

Viewing Benefits

The **Benefits Information** section provides the help desk agent with a summary of the caller's benefits to help them answer common questions about health plans, level of coverage, contributions to a savings plan, and coverage for dependents and beneficiaries.

Here is an example of the Benefits section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Benefits section - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Benefits Information

Benefit Record Number0

COBRA Event Identification0

Benefits

Type of Benefit	Plan Description	Coverage or Participation
Medical	Non-Netwk	Family
Dental	Enh Dental	Family
Vision	VIS Std	Family
Life	Basic Life	\$ 50000
Supp Life	2x Salary	Salary X 2
AD/D	ADD 25K	\$ 25000
Dep AD/D	Dpnd AD&D	\$ 10000
Dep Life	DepLife EE	\$10000
Supp AD/D	SuppADD5	\$ 500000
STD	STD 50%	50% of Salary
LTD	LTD 50	50% of Salary
401(k)	401k Pct	3% Before Tax and 3% After Tax
Profit Shr	Profit	Participating
ESPP	ESPP	1% After Tax
Sick	GBI Sick	Participating
Vacation	GBI Vacn	Participating
US Pensn 1	GBI Pensn	\$25 voluntary

Currency CodeUSD

Dependents/Beneficiaries

Name	Relationship	Type of Benefit	Coverage
Megan Santos	Spouse	Medical	Covered
Megan Santos	Spouse	Dental	Covered
Megan Santos	Spouse	Vision	Covered
Megan Santos	Spouse	Life	100%
Megan Santos	Spouse	Supp Life	100%
Megan Santos	Spouse	AD/D	70%
Megan Santos	Spouse	Dep AD/D	Covered
Megan Santos	Spouse	Dep Life	Covered
Megan Santos	Spouse	Supp AD/D	70%
Megan Santos	Spouse	401(k)	70%
Megan Santos	Spouse	Profit Shr	70%
Megan Santos	Spouse	ESPP	25%
Megan Santos	Spouse	US Pensn 1	25%
Marguerite Santos	Child	Life	25%
Marguerite Santos	Child	Supp Life	25%
Marguerite Santos	Child	AD/D	10%
Marguerite Santos	Child	Dep AD/D	Covered
Marguerite Santos	Child	Dep Life	Covered
Marguerite Santos	Child	Supp AD/D	10%
Marguerite Santos	Child	401(k)	10%

Here is an example of the Benefits section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

This example illustrates the fields and controls on the Benefits section - HRHD Worker 360-Degree View page (E-Business HCM).

Benefits Information				First 1 of 1 Last			
Benefit Record Number 0							
Benefits				Dependents/Beneficiaries			
Type of Benefit	Plan Description	Coverage or Participation		Name	Relationship	Type of Benefit	Coverage
Medical	Aetna (PPO)	EE & Family		James,Stephanie	Spouse	Medical	COVERED
Dental	Comprehensive Dental Plan	EE & Family		James,Stephanie	Spouse	Dental	COVERED
Vision	Vision Plan 1	EE & Family		James,Stephanie	Spouse	Vision	COVERED
Life	AD & D	3 X Compensation		James,Robert Jr.	Child	Medical	COVERED
Life	Life	3 X Compensation		James,Robert Jr.	Child	Dental	COVERED
Life	Spousal Life	Decline Coverage		James,Robert Jr.	Child	Vision	COVERED
Life	Dependent Life	\$10,000		James,Stephanie	Spouse	Life	100
Life	Business Travel Accident Insur	\$50,000		James,Stephanie	Spouse	Business Travel Accident Insur	100
Disability	Long Term Disability	66 2/3% of Annual Compensation					

The **Benefits** grid contains information regarding the individual's coverage. The **Dependents/Beneficiaries** grid contains information regarding the coverage for the individual's dependents and beneficiaries.

This information comes from E-Business HCM or from the PeopleSoft HCM Base Benefits module. When using PeopleSoft HCM, data is available to support the U.K. and France. The U.K. currently uses the Base Benefits module to manage benefit enrollment for employees.

Direct Reports

Here is an example of the Direct Reports section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

This example illustrates the fields and controls on the Direct Reports sections - HRHD Worker 360-Degree View page (E-Business HCM).

Direct Reports					
Name	EBS Empl No	Location	Employment Status	Add Case	
Gootee,Mr. Satish	1549	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
McAllister,Mr. Lindsay	1560	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Roundtree,Mr. Ioki	1911	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Fish,Jack	553	Boston Mfg Plant 2 used in Ope	Separated		Add Case
Brown,Mark	549	Boston Mfg Plant 2 used in Ope	Separated		Add Case
Pukta,Mr. Frank	1309		Active Assignment		Add Case
Ross,Mrs. Fran	1936	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Johnson,Mr. Landy	1938	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Madrid,Mr. Landy	1724	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Joseph,Brian	350	Boston Mfg Plant 2 used in Ope	Active Assignment		Add Case
Golden,Josh	552	Boston Mfg Plant 2 used in Ope	Separated		Add Case
Bowers,Joanna	1277		Active Assignment		Add Case
Feiss,Mrs. Fran	1722	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Aoks,Mr. Ioki	1697	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case
Smith,Mrs. Patricia	1920	Boston Mfg Plant 2 used in Ope	Term w/Pay		Add Case

United Kingdom Requirements

For UK customers, the system displays **Company Car** in the **Benefits** sections. The system displays the attributes of the car, such as make and model, if the attributes are included in the 360 Sync Response message.

Here is an example of the Benefits and Direct Reports (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Benefits Information and Direct Reports sections (United Kingdom) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Benefits Information		Benefit Record Number 0 COBRA Event Identification 0		Currency Code GBP		First 1 of 1 Last									
<table border="1"> <thead> <tr> <th>Type of Benefit</th> <th>Plan Description</th> <th>Coverage or Participation</th> </tr> </thead> <tbody> <tr> <td>Comp. Car</td> <td>CCARUK</td> <td>MER C220CD1</td> </tr> </tbody> </table>				Type of Benefit	Plan Description	Coverage or Participation	Comp. Car	CCARUK	MER C220CD1	<table border="1"> <thead> <tr> <th>Dependents/Beneficiaries</th> </tr> </thead> <tbody> <tr> <td>No Benefits exist for Dependents/Beneficiaries.</td> </tr> </tbody> </table>				Dependents/Beneficiaries	No Benefits exist for Dependents/Beneficiaries.
Type of Benefit	Plan Description	Coverage or Participation													
Comp. Car	CCARUK	MER C220CD1													
Dependents/Beneficiaries															
No Benefits exist for Dependents/Beneficiaries.															
Direct Reports															
Name	Employee ID	EBS Empl No	Location	Employee Status	Add Case										
Robin de la Camara	KG0009		Reading - England	Active	 Add Case										

Requirements for France

Since France does not use Base Benefits to manage employee benefits enrollments, the system does not display information in the Benefits Information section. Instead, it displays this message: *No Benefits Information exists for this person.*

Here is an example of the Benefits and Direct Reports (France.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

This example illustrates the fields and controls on the Benefits Information and Direct Reports sections (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Benefits Information No Benefits Information exists for this person.
Direct Reports No Direct Reports exists for this person.

Viewing New Action Links and Security Roles

Agents use action links when the information on the Worker 360-Degree View page is insufficient to answer the caller's questions. The agent can create a case for the caller and transfer to the pages in PeopleSoft or E-Business HCM directly from the case to find additional HR-related information.

With the introduction of Global Payroll, PeopleSoft CRM added new action links to the interface with PeopleSoft HCM versions 8.9 and above. This table lists the action links associated with PeopleSoft Global Payroll information:

Action Link Category	Link
Benefits	Car Allocation Car Plan
Human Resources	Update Contract
Global Payroll - France	Payslip — FRA Request Loans — FRA Garnishments —FRA

Action Link Category	Link
Global Payroll - UK	Payslip — GBR Review Loans — GBR Maintain Loans — GBR Absence Event — GBR
Global Payroll - Core	Bank Account Net Pay Elections Absence Event

The system displays the action links on the Case page based on the agent's security access. If the agent doesn't have access, the system does not display the link in the action category drop-down list box.

Viewing HR-Related Payroll Information on the 360-Degree View Page for US Federal

PeopleSoft HCM may be set up and used by US Federal employees. These organizations capture and use data elements which are different from private organizations who have implemented PeopleSoft HCM.

This topic discuss about the fields and sections that are newly introduced in 360–Degree View page, for providing effective service delivery to the Federal employees. For details on common fields and sections available in 360–Degree View page, see [Viewing HR-Related Payroll Information on the 360-Degree View Page](#)

Note: The system delivers new role and permission list that enables to provide a different HRHD 360-Degree View to the Agents who have access to US Federal data. The permission list will be similar to 'HRHD 360-degree View', but specifically used only for the 'HRHD 360 Degree View for USF' role. For more details, see "Configuring the 360-Degree View Search Page" (Application Fundamentals) Use the Define HCM Sections page to enable or disable the sections specific to US Federal on the HRHD 360-Degree View page. For details, see [Define HCM Sections Page](#)

The job records for federal employees are displayed in HRHD 360 degree based on GVT WIP status. System should display the job records only if the WIP status is set to either Complete or Corrected or IRR Reported. For more details, see Understanding Delivered Sample WIP System Parameters section in HCM Online Help.

Viewing US Federal Employment

The US Federal Employment section displays DOS Tenure and Service computation dates for the US Federal employee.

Note: This section is enabled only for US Federal employees.

This example illustrates the fields and controls on the US Federal Employment section - HRHD 360-Degree View page.

This table describes the fields available in the US Federal Employment section.

Fields in the US Federal Employment Section	Description
SCD Tenure	Displays the type of employment for the US Federal employee such as Permanent, Indefinite, and the like.
SCD Leave Date, SCD Retire Date, SCD TSP	Displays the dates related to the service of the US Federal employee.

Viewing US Federal Job and Position Summary

The Job and Position Summary section provides US Federal employees with a summary of the caller's job data to answer common questions about an employee's job title, location, or status.

This example illustrates the fields and controls on the Job and Position Summary section - HRHD 360-Degree View page. The highlighted fields are applicable only for US Federal employees.

This table describes the fields applicable only for US Federal employees in the Job and Position Summary section.

Fields in the Job and Position Summary Section	Description
FLSA Status	FLSA status determines whether the employee is eligible for being paid for overtime.
Type of Appointment	Displays the type of appointment for US Federal employee.

For details on the rest of fields available in the Job and Position Summary section, see [Viewing Job and Position Summary](#)

Viewing US Federal Compensation

The US Federal Compensation section provides a summary of payplan series, grade and step for the US Federal employee

This example illustrates the fields and controls on the US Federal Compensation section - HRHD 360-Degree View page.

Note: This section is enabled only for US Federal employees.

US Federal Compensation		First	1 of 1	Last
Pay Plan	GS	Payplan Table	0000	
Payplan Grade	08	Step	6	

This table describes the fields available in the US Federal Compensation section.

Fields in the US Federal Compensation Section	Description
Pay Plan, Pay Plan Table, Pay Plan Grade and Step	Displays the pay plan, pay plan grade, series and step for the US Federal employee.

Viewing US Federal Benefits Information

This section provides an overall view of the benefit plan, retirement data associated with the employee.

This example illustrates the fields and controls on the Benefits Information section - HRHD 360-Degree View page. The highlighted fields are applicable only for US Federal employees.

Benefits Information				First	1 of 1	Last
Benefit Record Number	0	Currency Code	USD			
COBRA Event Identification	0	Benefit Program	Full Time Employee Benefit Pgm			
Retirement Plan	FERS and FICA					
Benefits			Dependents/Beneficiaries			
Type of Benefit	Plan Description	Coverage or Participation	Name	Relationship	Type of Benefit	Coverage
FEHB	MGCare	Self High	Anthony Rodriguez	Spouse	TSP	100%
Basic Life	Basic Life	Salary X 1 + \$ 2000	Emilio Rodriguez	Child		
Option B	Opt B 1X	Salary X 1	Phoebe Rodriguez	Child		
Option C	Opt C 1X	\$ 5000	Antonio Rodriguez	Child		
Option A		Waived				
TSP	TSP Match	4% Before Tax				
Sick	Sick FT	Participating				
AnnLeave	Annual -FT	Participating				
Retirement	FERS&FICA	Participating				
1% Auto	TSP1%	Participating				

This table describes the fields applicable only for US Federal employees in the Benefits Information section.

Fields in the Benefits Information Section	Description
Benefit Program	Benefit plan associated with the US Federal employee

<i>Fields in the Benefits Information Section</i>	<i>Description</i>
Retirement Plan	Retirement plan for the US Federal employee.

For details on the rest of the fields available in the Benefits Information section, see [Viewing Benefits](#)

Chapter 9

Defining Options for Integration to PeopleSoft Campus Solutions

Understanding the Integration Between PeopleSoft CRM and PeopleSoft Campus Solutions

This topic discusses:

- EIP message process.
- Request message.
- Response message.

EIP Message Process

All search information is stored in the PeopleSoft CRM database. When an agent accesses the 360-Degree View page for a specific constituent, a secured synchronous request is sent to PeopleSoft CS.

When PeopleSoft CS validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by the SCC_CONSTITUENT Integration Broker service and its associated synchronous service operation and request and response messages.

See “Understanding 360-Degree View Setup” (Application Fundamentals).

Request Message

The system sends a secured sync request message from PeopleSoft CRM to PeopleSoft CS. The system validates the requestor's information before processing the request.

The request message contains this information:

- EmplID (employee ID) from the 360-Degree View search page.
- Checklist, Communications, and Comments (3C) option (to indicate if data for this section is being requested).
- Admissions option (to indicate if data for this section is being requested).
- Transfer Credits option (to indicate if data for this section is being requested).
- Academics option (to indicate if data for this section is being requested).
- Finances option (to indicate if data for this section is being requested).

- Financial Aid option (to indicate if data for this section is being requested).
- Transcript option (to indicate if data for this section is being requested).
- Contributor Relations option (to indicate if data for this section is being requested).
- Affiliations option (to indicate if data for this section is being requested).
- Language Code.

The language that the agent uses to log on to the application. The default value is (*%language*). PeopleSoft Campus Solutions retrieves information based on the language code in the request for internationalization support.

Response Message

The sync response from PeopleSoft CS contains a response to the information provided in the request.

The response contains multiple rowsets that provide data for the summary (profile) section of the 360-degree view page and for all of the requested sections that are specific to the 360-Degree View for Higher Education (Checklist, Communications, and Comments; Admissions; Transfer Credits; Academics; Finances; Financial Aid; Transcript; Contributor Relations; and Affiliations).

Note: You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft CS as well as grant security access to the information and enable single sign on in PeopleSoft CS. Depending on the setup in PeopleSoft CS, a user ID may not have access to all of the information.

When all data for a particular 360-degree view section originates from the same component in PeopleSoft CS and the user does not have security access to the component, the word *Secured* is displayed instead of showing the details for that section. However, if data for the section originates from different components and the user has access to some but not all of those components, all details in the section are displayed but the fields for which the user has no security will appear blank

Viewing Campus Solutions-Related Information on the 360-Degree View Page

This topic discusses how to view campus solutions-related information on the 360-Degree View page.

Page Used to View Campus Solutions-Related Information on the 360-Degree View Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Constituent 360-Degree View Page</u>	RB_TD_AGENT_VIEW	View academic-related data for a constituent that comes over to PeopleSoft CRM from PeopleSoft Campus Solutions.

Constituent 360-Degree View Page

Use the Constituent 360-Degree View page (RB_TD_AGENT_VIEW) to view academic-related data for a constituent that comes over to PeopleSoft CRM from PeopleSoft Campus Solutions.

Navigation:

Constituent 360-Degree View

This example illustrates the fields and controls on the Constituent 360-Degree View page (1 of 7).

360-Degree View

Refresh | New Search | Notification | Correspond | Academics | >> Personalize

360-Degree View | Relationship Viewer | Tasks | Call Reports

*Role: Individual Consumer Actions: Add Case Go

Summary

Name: Daniel Delgado

Home Phone: 818/555-4455 ID: ADCRM1003

Business Email: HCMGENUser1@ap6023fems.us.oracle.com Campus ID: CIDADCRM1003

Home Address: 32833 Elm Street Encino, CA 91436-2311 Current Status: Prospect 2007 Fall

[View Consumer Details](#)

This example illustrates the fields and controls on the Constituent 360-Degree View page (2 of 7).

Activities

*Date Filter: 7 - View All First | Previous | Next | Last | Left | Right

Overview of - Daniel Delgado

Global Cases

Related - (0)

Not Related - (2)

[View All](#)

Cases

Authorized Cases - (0)

[View All](#)

Unauthorized Cases - (0)

[View All](#)

[Add Case](#)

[Search Cases](#)

Installed Products - (0)

Assets - (0)

Service Orders - (0)

Change Requests - (0)

Work Orders - (0)

Defects - (0)

Leads - (0)

Opportunities - (2)

Marketing Activities - (0)

Events

Interactions - (0)

† Date filter does not apply to this node

Global Cases (Related)

No Global Cases (Related) to display.

Add Interaction Note

Current Actions

This example illustrates the fields and controls on the Constituent 360-Degree View page (3 of 7).

Higher Education Information

Checklists/Communications/Comments

Checklists [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | First | 1-3 of 12 | Last

Function	Institution	Checklist Type	Checklist	Item	Status	Due Date	Date Time
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Recommendation Letter	Completed	05/01/2007	05/30/2007
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Academic Transcripts	Completed	05/01/2007	05/30/2007
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Transfer Statement	Completed	05/01/2007	05/30/2007

Communications [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | First | 1-3 of 4 | Last

Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Time
Admissions Application	Great Lakes University	Undergraduate App Processing	Document	Incoming Communication		Y	06/01/2007	05/30/2007
Admissions Application	Great Lakes University	Undergraduate App Processing	Document	Incoming Communication		Y	02/01/2007	05/30/2007
Admissions Program	PeopleSoft University	Grad Application Decision	Letter	Outgoing Communication	Grad Admit	Y	05/15/2007	05/30/2007

This example illustrates the fields and controls on the Constituent 360-Degree View page (4 of 7).

Comments [Customize](#) | [Find](#) | [View All](#) | [Print](#) | [Grid](#) | First | 1-3 of 4 | Last

Function	Institution	Category	Comment ID	Name	Date Time Created
Admissions Application	PeopleSoft University	Graduate Applications	KU0007	Betty Locherty	05/30/2009 7:09:57PM
Admissions Application	PeopleSoft University	Graduate Evaluations	KU0007	Betty Locherty	05/30/2009 7:08:59PM
Admissions Application	PeopleSoft University	Graduate Evaluations	KU0007	Betty Locherty	05/30/2009 7:08:11PM

Recruiting [Find](#) | [View All](#) | First | 1 of 2 | Last

Institution Great Lakes University **Career** Graduate

Admit Type Graduate First Year **Admit Term** 2007 Fall

Recruiting Status Applicant **Source Date** 05/05/2007

Last School Attended **Graduation Date**

School Type **Campus** Main Campus

Program Information [Customize](#) | [Find](#) | [Print](#) | [Grid](#) | First | 1 of 1 | Last

Program	Lifecycle Status	Date	Academic Plan	Sub-Plan
Arts & Sciences	Prospect	01/20/2009	Mathematics	

This example illustrates the fields and controls on the Constituent 360-Degree View page (5 of 7).

Admissions			
Institution PeopleSoft University		Application Number 00024574	
Career GRADUATE		Application Date 06/13/2008	
Admit Type Transfer		Admit Term 2007 Fall	
Application Fee Status Pending		Primary Program GRADUATE SCIENCE PROGRAMS	
Program Status Active		Program Action Date 05/30/2009	
Program Action Matriculation		Program Action Reason	
Plans and Sub-Plans			
Customize Find First 1 of 1 Last			
Academic Plan	Description	Sub-Plan	Description
CHEM-MS	Chemistry (MS)		
No Transfer Credit Information has been added.			
Academics			
Institution PeopleSoft University		Career GRADUATE	
Program GRADUATE SCIENCE PROGRAMS		Program Status Completed Program	
Admit Term 2007 Fall		Campus Main Hacienda Campus	
Cumulative Units 27.000		Expected Grad Term 2008 Spring	
Plans and Sub-Plans			
Customize Find First 1 of 1 Last			
Academic Plan	Description	Sub-Plan	Description
CHEM-MS	Chemistry (MS)		

This example illustrates the fields and controls on the Constituent 360-Degree View page (6 of 7).

Recent Term			
Term 2008 Spring		Primary Program GRADUATE SCIENCE PROGRAMS	
Academic Load Enrolled Full-Time		Approved Load Full-Time	
Term Units 15.000		Academic Standing	
Finances			
Find View All First 1 of 2 Last			
Business Unit Glake Bursar		Amount Due Now 1,989.00 USD	
Deposit Due 0.00 USD		Overall Due 1,989.00 USD	
Anticipated Aid No		Payment Plan None	
Last Bill Date 06/05/2009		Last Refund Date	
Last 1098 T Year 2009		1098 T Status AWAITING CONSENT	
Financial Aid			
Find View All First 1 of 4 Last			
Institution Great Lakes University		Aid Year Financial Aid Year 2007 - 2008	
Aid Application Date 06/18/2009		Aid Processing Status Packaging Completed	
SAP Status Meets SAP		Aid Offered Yes	
Aid Accepted All		Aid Disbursed All	
Last FAN Date Time 06/08/2009 3:44:29PM		FAN Status Printed	

This example illustrates the fields and controls on the Constituent 360-Degree View page (7 of 7).

The screenshot displays the Constituent 360-Degree View page. At the top, there is a header bar with a dropdown menu labeled 'Transcript Requests' and navigation links: 'Find', 'View All', 'First', '1 of 2', and 'Last'. Below this, a table-like structure shows the following details:

Institution	PeopleSoft University	Request Date	06/02/2009
Transcript Type	ALLOF	Description	Official Transcripts - All
Request Status	Completed	Request Reason	Web Transcript Request

Below the table, there are two expandable sections:

- Contributor Relations**: A section with a blue header and a message: 'No Contributor Relation Information has been added.'
- Affiliations**: A section with a blue header and a message: 'No Affiliation Information has been added.'

From the 360-Degree View page in PeopleSoft Service Center for Higher Education you can view fields for the sections on Checklist, Communications, and Comments; Recruiting; Admissions; Transfer Credits; Academics; Finances; Financial Aid; Transcript; Contributor Relations; and Affiliations.

So that agents can only access the information that they have permission to view, the 360 EIP includes row-level security. Rather than maintaining a second layer of security in the CRM setup pages, you only have to set up this security once. Using the Configure Roles page, you have the ability to configure which Campus Solutions sections are available for a user with that role who accesses the Constituent 360-Degree View page.

Related Links

“Understanding AAF” (Automation and Configuration Tools)

“Configuring the 360-Degree View Search Page” (Application Fundamentals)

Viewing Checklists, Communications, and Comments

This section includes data from the checklists, communications, and comments associated with the constituent to help provide agents with helpful information as they work on that person’s request or issue.

Checklists, communications, and comments provide a way to track and analyze correspondence, lists of requirements, and notes about constituents.

- Checklists are used to assign lists of requirements to individuals, organizations, events, or groups of individuals and to monitor constituent’s progress toward completing those requirements.
- Communications enable users to track and analyze all of the institution’s contacts with students, staff, constituents, and organizations inside and outside the institution. Note that the Constituent 360-Degree View only displays communications to and from constituents.
- Comments enable users to track remarks, explanations, or clarifications about individuals and organizations. Note that the Constituent 360-Degree View only displays comments regarding constituents.

Here is an example of the Checklist, Communications, and Comments section from the Service Center for Higher Education Constituent 360-Degree View page.

This example illustrates the fields and controls on the Checklist, Communications, and Comments section of 360-Degree View for Higher Education page.

▼ Checklists/Communications/Comments

Checklists

Customize | Find | View All | First 1-3 of 6 Last

Function	Institution	Checklist Type	Checklist	Item	Status	Due Date	Date Time
Admissions Program	PeopleSoft University	Requirements List	UG Appl Requirements - All	ACT or SAT I Test Scores	Initiated	04/01/2008	05/29/2009
Admissions Program	PeopleSoft University	Requirements List	UG Appl Requirements - All	Personal Statement	Initiated	04/01/2008	05/29/2009
Admissions Program	PeopleSoft University	Requirements List	UG Appl Requirements - All	Academic Transcripts	Initiated	04/01/2008	05/29/2009

Communications

Customize | Find | View All | First 1-3 of 3 Last

Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Time
Admissions Application	PeopleSoft University	Undergrad Appl Processing	Letter	Outgoing Communication	Frosh Application Acknlgmt	Y	03/17/2008	05/29/2009
Event	PeopleSoft University	Undergrad Post-Appl Event	Letter	Outgoing Communication	Fall Event Invitation	Y	06/11/2007	05/29/2009
Admissions Program	PeopleSoft University	Undergrad Appl Decision	Letter	Outgoing Communication		N		05/29/2009

Comments

Customize | Find | View All | First 1-2 of 2 Last

Function	Institution	Category	Comment ID	Name	Date Time Created
Admissions Application	PeopleSoft University	Undergrad Admission - Secure	KU0007	Betty Locherty	05/29/2009 5:10:02PM
Admissions Program	PeopleSoft University	Undergraduate Evaluations	KU0007	Betty Locherty	05/29/2009 5:08:33PM

Checklists

Field	Description
Function	The code for the functional area with which the constituent is associated, for example <i>Admissions</i> .
Institution	Institution that applies to the specific Checklist.
Checklist Type	Type that best describes the checklist
Checklist	The code that describes the checklist assigned to an individual, organization, or event.
Item	Items available for specific checklists.

Field	Description
Status	The Checklist Status.
Due Date	The date by which the checklist must be completed for the constituent.
DateTime	Date and time when checklist was created.

Communications

Field	Description
Function	The code for the functional area with which the constituent is associated.
Institution	Institution associated with this communication.
Category	The category of communication context to indicate why a communication was sent or received
Method	Indicates the form of a communication (for example, letter, email, or phone call).
Direction	The direction of a communication, such as in person, incoming communication, or outgoing communication.
Letter	The letter code for a communication. The code specifies the variable data associated with this communication.
Status	The communication status. Valid values are <i>Completed</i> or <i>Not Completed</i> .
Date Completed	Date when the communication was completed.
Communication Date	Date the communication was created.

Comments

<i>Field</i>	<i>Description</i>
Function	The code for the functional area with which this constituent is associated.
Institution	Institution associated with this comment.
Category	The business need with which this comment is associated.
Comment ID	ID of the person entering the comment
Name	The name of the person entering the comment.
DateTime	Date and time when the comment was created.

Viewing Recruiting Information

This section provides a summary of a suspect's or prospect's academic interest.

The information in this section is stored in and retrieved from the PeopleSoft CRM system; it is not part of the EIP message to PeopleSoft Campus Solutions.

When there is no program information for a given institution and career, academic information is retrieved for data where the recruiting status is *Suspect*, *Prospect*, or *Applicant*.

When there is program information for a given institution and career, academic information is displayed for any program where the constituent's lifecycle status is *Suspect*, *Prospect*, or *Applicant*.

This example illustrates the fields and controls on the Recruiting section of 360-Degree View for Higher Education page.

▼ Recruiting		Find View All	First	1 of 2	Last
Institution	Great Lakes University	Career	Graduate		
Admit Type	Graduate First Year	Admit Term	2007 Fall		
Recruiting Status	Applicant	Source Date	05/05/2007		
Last School Attended		Graduation Date			
School Type		Campus	Main Campus		

Field	Description
Institution	Institution that is recruiting the potential suspect or prospect.
Career	Prospective academic career in which a suspect or prospect has an interest, such as <i>Undergraduate</i> , <i>Graduate</i> , or <i>Continuing Education</i> .
Admit Type	Admit type for this suspect or prospect, such as <i>First-Year</i> , <i>Second-Year</i> , or <i>Transfer</i> .
Admit Term	The admit term in which the suspect or prospect is expected to enroll.
Recruiting Status	Indicates the level of interest, at the academic career level, that the prospective student has in the institution.
Source Date	Career source date for which the program status record was added. The source date is the date that the data was loaded
Last School Attended	Suspect or prospect's last school attended.
Graduation Date	Graduation date from the last school the suspect or prospect attended. This may be a future date.
School Type	School type (for last school attended) of the suspect or prospect.
Campus	Suspect or prospect's prospective campus if applying to the institution. The campus is associated with the program and is often where the student will attend classes.
Program	Suspect or prospect's prospective interest in an academic program such as <i>Graduate of Fine Arts Program</i> .
Lifecycle Status	The individual's Lifecycle Status indicates the perceived level of interest, at the academic program level, that a potential student has in the institution. For example, a person who attended an on-campus event may be considered a suspect (someone who you suspect is interested in the institution). A person who requests a catalog may be considered a prospect (someone who has indicated interested in the institution).
Status Date	Date for which the program status was added.
Plan	Academic plan for which a suspect or prospect has indicated a potential interest.

Field	Description
Sub-Plan	Suspect or prospect's potential interest in a specific academic Sub-Plan. Sub-Plans are areas of further specialization within an academic plan.

Viewing Admissions Information

This section displays a constituent's admissions information. The data originates from the Admissions page of the Student Service Center and the Application Data component in Campus Solutions.

If the constituent is applying for multiple sub-plans within one plan (such as multiple specialties or concentrations), the grid displays a row for each sub-plan.

This example illustrates the fields and controls on the Admissions section of 360-Degree View for Higher Education page.

Admissions Find | View All First 1 of 3 Last

Institution PeopleSoft University **Application Number** 00024572
Career GRADUATE **Application Date** 06/13/2008
Admit Type First-Year **Admit Term** 2010 Fall
Application Fee Status Pending **Primary Program** GRADUATE LIBERAL ARTS PROGRAMS
Program Status Applicant **Program Action Date** 05/29/2009
Program Action Application **Program Action Reason**

Plans and Sub-Plans Customize | Find | First 1 of 1 Last

Academic Plan	Description	Sub-Plan	Description
EDPOL-MA	Educational Policy-MA		

Field	Description
Institution	Institution to which the constituent is applying.
Application Number	Unique identification number of the application. The application number will display as zeros if an application has not yet been created.
Career	Name of the career for which the constituent is applying.
Application Date	The date on which the application was received.
Admit Type	Admit type for this application.
Admit Term	The admit term in which the applicant is expected to enroll.
Application Fee Status	Current application fee status for the application. Values include: <i>Received</i> , <i>Pending</i> , and <i>Waived</i> .

Field	Description
Primary Program	The academic primary program to which the constituent is applying.
Program Status	Constituent's program status. Possible values are <i>Active</i> , <i>Admitted</i> , and <i>Waitlisted</i> .
Program Action Date	The date that the action was entered into the system.
Program Action	Program action designates the status of a constituent in a program from the time he or she is an applicant and throughout the constituent's academic career. For example, a constituent must have a program action of <i>Matriculate</i> to become a student, and a program action of <i>Activate</i> in any term in which he or she wants to enroll.
Program Action Reason	Indicates why a particular program action was taken, or provides a further description of the program action. For example, the institution can record that an applicant has withdrawn an application for an academic program.
Plan	Academic plan for which a suspect or prospect has indicated a potential interest.
Sub-Plan	Suspect or prospect's potential interest in a specific academic Sub-Plan. Sub-Plans are areas of further specialization within an academic plan.

Viewing Transfer Credits Information

The Transfer Credits section enables agents to view high level transfer credit information for students.

This example illustrates the fields and controls on the Transfer Credits section of 360-Degree View for Higher Education page.

▼ Transfer Credits		Find View All First 1 of 5 Last
Credit Type	Course Credit	Credit Source University of Omaha
Institution	Great Lakes University	Career UNDERGRADUATE
Program	ARTS & SCIENCES	Articulation Term 2007 SUMMER
Model Status	Posted	Units Transferred 3.000

Field	Description
Credit Type	Identifies the type of credit information being displayed. Valid values are: <i>Course Credit</i> , <i>Test Credit</i> , and <i>Other Credit</i> .

Field	Description
Credit Source	Identifies the source of the credit. For <i>Course Credit</i> this is the institution in which the constituent earned credits that are being transferred. For <i>Test Credit</i> and <i>Other Credits</i> this field is blank.
Institution	Academic institution for which the specified individual's transfer credit was processed.
Career	Academic career for which you want to retrieve the specified individual's transfer credit summaries.
Program	Academic program for which you want to retrieve the specified individual's transfer credit summaries.
Articulation Term	Term for which the target institution processes the constituent's transfer credit.
Model Status	The status of the transfer credit model. Valid values are: <i>Submitted</i> , <i>Completed</i> , or <i>Posted</i> .
Units Transferred	The units of the internal equivalent course. Only those units that have been posted will be displayed.

Viewing Academics Information

The Academics section provides academic advisors and other users with an overview of a student's academic information.

The system uses the current term, closest future term, or most recent past term (in that order) to determine which term to display as the most recent term. The specific logic used for this process is:

- Choose the term with the smallest term code in which the *Term Begin Date* is less than or equal to today's date and the *Term End Date* is greater than or equal to today's date.
- If none of the student's terms satisfy the above criteria, choose the student's term with the smallest term code in which the *Term Begin Date* is greater than today's date.
- If none of the student's terms satisfy the above criteria, choose the student's term with the highest term code in which the *Term End Date* is less than today's date.

The data is sorted alphabetically by Institution, Career, and Program.

This example illustrates the fields and controls on the Academics section of 360-Degree View for Higher Education page.

Academics

Find | View All First 1 of 3 Last

Institution Great Lakes University
 Career UNDERGRADUATE

Program ARTS & SCIENCES
 Program Status Discontinued

Admit Term 2007 Summer
 Campus Main Campus

Cumulative Units 15.000
 Expected Grad Term

Plans and Sub-Plans

Customize | Find | First 1 of 1 Last

Academic Plan	Description	Sub-Plan	Description
UNDECLARED	Undeclared		

Recent Term

Term 2007 Summer
 Primary Program ARTS & SCIENCES

Academic Load Enrolled Full-Time
 Approved Load Full-Time

Term Units 15.000
 Academic Standing

Field	Description
Institution	Name of institution in which student is enrolled.
Career	Academic career for the constituent.
Program	The academic program in which the student is enrolled.
Program Status	Student's program status.
Admit Term	The admit term in which the student is enrolled.
Campus	The campus is associated with the program and is often where the student is attending classes.
Cumulative Units	Includes all passed units including both enrollment and transfer credit.
Expected Grad Term	Term and year in which the student is expected to graduate.
Plan	Academic plan within the academic program.
Sub-Plan	Area of further specialization within an academic plan.
Term	Most recent term for which a constituent has enrolled or has completed.
Primary Program	The constituent's primary academic program for the specified career and term combination.

Field	Description
Academic Load	The student's academic load for the specified career and term combination.
Approved Load	The academic load for which the student is enrolled, and which is approved by the institution for the term.
Term Units	Student's consolidated units for the most recent term.
Academic Standing	Academic status of the constituent.

Viewing Financial Information

The Finances section displays pertinent information regarding the students' account.

This example illustrates the fields and controls on the Finances section of 360-Degree View for Higher Education page.

▼ Finances		Find View All First 1 of 2 Last
Business Unit	Glake Bursar	Amount Due Now 1,989.00 USD
Deposit Due	0.00 USD	Overall Due 1,989.00 USD
Anticipated Aid	No	Payment Plan None
Last Bill Date	06/05/2009	Last Refund Date
Last 1098 T Year	2009	1098 T Status AWAITING CONSENT

Field	Description
Business Unit	A business unit can have its own set of business rules that enable campuses to operate independently from each other financially. You must set up at least one business unit.
Amount Due Now	Includes any charges incurred through the current date plus the number of days specified for the days in future for the <i>due now</i> field on the Institution Set page associated with the business unit.
Deposit Due	Deposits incurred to date.
Overall Due	Represents past due, current due, and any future due charges for the business unit.
Anticipated Aid	Student's pending or anticipated aid that has not been posted to their account. Values are <i>Yes</i> or <i>No</i> .
Payment Plans	Indicates whether a student is currently on a payment plan.

Field	Description
Last Bill Date	The last date a bill was generated for the student.
Last Refund Date	The last date a refund was generated for the student.
Last 1098 T Year	Year for which the Last 1098 T was generated for the student.
1098 T Status	Captures the status of the student's 1098-T. Values are: <i>Transmitted, Printed, and Awaiting Consent.</i>

Viewing Financial Aid Information

The Financial Aid section provides users with the ability to see whether financial aid has been offered, accepted, or disbursed, as well as the date and status of the last financial aid notification letter sent.

This example illustrates the fields and controls on the Financial Aid section of 360-Degree View for Higher Education page.

Financial Aid	
Institution Great Lakes University	Aid Year Financial Aid Year 2007 - 2008
Aid Application Date 06/18/2009	Aid Processing Status Packaging Completed
SAP Status Meets SAP	Aid Offered Yes
Aid Accepted All	Aid Disbursed All
Last FAN Date Time 06/08/2009 3:44:29PM	FAN Status Printed

Field	Description
Institution	Name of institution for which the constituent is applying for financial aid.
Aid Year	The financial aid year.
Aid Application Date	The date the student turned in an application or the date that identified the student as a possible recipient for financial aid.
Aid Processing Status	Indicates the processing status for a student financial aid package.
SAP Status (Satisfactory Academic Progress Status)	Indicates whether the student is meeting satisfactory academic progress (SAP). This is used to determine whether to award federal aid to the student. The SAP global disbursement rules use this field to determine whether to authorize disbursement of the student's award. Also, Common Line Disbursement Hold and Release processing uses this field to determine whether a hold should be placed on the student's Common Line loan.

Field	Description
Aid Offered	Indicates if aid has been offered based on the total of all disbursements for all awards that fall in the same aid year. Valid values are <i>Yes</i> (aid has been awarded) or <i>No</i> (no aid awarded).
Aid Accepted	Indicates if the student has accepted any offered aid. The valid values are <i>No</i> , <i>Partial</i> , or <i>All</i> .
Disbursed Aid	Indicates whether aid has been disbursed to the student's financial account. Valid values are <i>No</i> , <i>Partial</i> , or <i>All</i> .
Last FAN Date	Indicates the date and time the Financial Aid Notification (FAN) letter was created.
FAN Status	Indicates whether the FAN letter has been printed, is awaiting printing, is being revised or has an error.

Viewing Transcript Request Information

This section provides users with an overview of a student's transcript requests.

This example illustrates the fields and controls on the Transcript Request section of 360-Degree View for Higher Education page.

▼ Transcript Requests
Find | View All
First
1 of 2
Last

Institution PeopleSoft University
Request Date 06/02/2009

Transcript Type ALLOF
Description Official Transcripts - All

Request Status Completed
Request Reason Web Transcript Request

Field	Description
Institution	Name of institution in which student is requesting a transcript.
Request Date	Date student requested the transcript.
Transcript Type	Transcript student is requesting such as <i>Official</i> or <i>Unofficial</i> transcript.
Request Status	The transcript status.
Request Reason	Reason for the transcript request. The reason appears on the transcript if the transcript type is set to display request reason information.

Viewing Contributor Relations Information

This section displays a record of lifetime gifts and pledges made by a constituent and by other individuals with whom the constituent has a personal or organizational relationship.

This example illustrates the fields and controls on the Contributor Relations section of 360-Degree View for Higher Education page.

Contributor Relations

Find

View All

First

1 of 1

Last

Institution

PeopleSoft University

Lifetime Commitments

20,000.00 USD

Lifetime Open Pledges

0.00 USD

Lifetime Gifts/Payments

20,000.00 USD

Lifetime Hard Credits

8,000.00 USD

Total YTD Giving

0.00 USD

Total Years Giving

3

Consecutive Years Giving

Relationships

Customize

Find

First

1-3 of 3

Last

Name	Relationship	Lifetime Commitments	Currency	Lifetime Open Pledges	Currency	Lifetime Gifts/Payments	Currency
Hamilton,Francesca Elizabeth	Spouse	20,000.00	USD	0.00	USD	20,000.00	USD
Hamilton,James Otto	Son	1,000.00	USD	0.00	USD	1,000.00	USD
Hamilton,Lawrence Stanley	Brother	14,000.00	USD	0.00	USD	14,000.00	USD

Field	Description
Institution	Name of institution with which the constituent or relative has a history of giving money.
Lifetime Commitment \$	Displays the total amount of money ever donated or pledged by the donor.
Lifetime Open Pledge \$	Displays the total amount of money promised but not yet donated by the donor.
Lifetime Gift/Payments \$	Displays the total amount of money ever given by the donor. This amount only includes money actually received, and excludes outstanding pledges.
Lifetime Hard Credits \$	Displays the total amount of hard credit given to the donor for recognition purposes.
Total YTD Giving \$	Displays the total amount in gifts and pledge payments the donor made to the allocation account during this fiscal year.
Total Years Giving	Displays the total number of years in which the donor has given to the institution. Only hard credit recognition is used to calculate this field.
Consecutive Years Giving	Displays the total number of consecutive years in which the donor has given to your institution. The value in this field resets to zero if more than one year has passed since the donor's most recent gift.

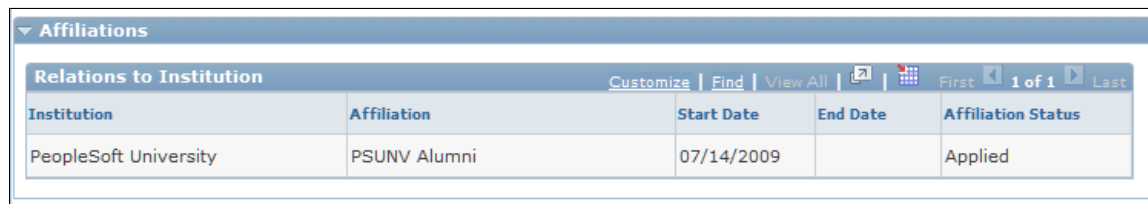
Relationships

Field	Description
Name	Displays the name of the donor.
Relationship	Displays the donor's relationship to the constituent. Only active relationships are displayed.
Lifetime Gift/Payments \$	Displays the total amount of money ever donated by the donor who has a relationship with the constituent. This amount only includes money actually received, and excludes outstanding pledges.
Currency	Currency of the Lifetime Commitments, Lifetime Open Pledge, and Lifetime Gifts/Payments.

Viewing Affiliations Information

This section provides a history of the constituent's active and inactive relationship with the institution.

This example illustrates the fields and controls on the Affiliations section of 360-Degree View for Higher Education page.



▼ Affiliations				
Relations to Institution				
Customize Find View All [Icons] First 1 of 1 Last				
Institution	Affiliation	Start Date	End Date	Affiliation Status
PeopleSoft University	PSUNV Alumni	07/14/2009		Applied

Field	Description
Affiliations	Indicates the constituent's relationship to the institution.
Start Date, End Date	Start and end dates of the affiliation.
Affiliation Status	Indicates the current state of the affiliation. Valid values are <i>Active</i> or <i>Inactive</i> .

Setting Up Full Sync Integration with PeopleSoft HCM

Understanding Full Sync Integration with PeopleSoft HCM

This topic provides an overview of the CRM full sync integration process with PeopleSoft HCM.

CRM uses full sync integration points during system implementation to import all data for a given set of HCM table(s). After all full syncs are processed, incremental sync integration points are activated to ensure that additions, modifications, and deletions of data in PeopleSoft HCM are imported into CRM. The CRM Full Sync Integration Guided Process enables you to improve and simplify the processing of full sync integration points between PeopleSoft HCM and CRM.

Setting Up Full Sync Integration with PeopleSoft HCM

CRM uses full sync integration points during system implementation to import all data for a given set of HCM table(s). After all full syncs are processed, incremental sync integration points are activated to ensure that additions, modifications, and deletions of data in PeopleSoft HCM are imported into CRM. To manage integration between PeopleSoft HCM and CRM, Integration Broker technology is utilized to configure, activate, and monitor integration that synchronizes a given set of HCM table(s). In addition to this technology, Enterprise Components integration definitions and processes are utilized to configure full sync data rules and initiate the full sync integration points. When you run a full or incremental integration point, the imported data is loaded directly into the CRM table(s). Because of data dependencies, some integration points must be run in a specific order. The CRM Full Sync Integration Guided Process enables you to improve and simplify the processing of full sync integration points between PeopleSoft HCM and CRM. The process enables you to initiate and monitor full sync integration points between HCM and CRM while the guided process is hosted on PeopleSoft HCM.

For more information on how to set up and implement the full sync integration, see the red paper available at: <https://support.oracle.com/epmos/faces/DocumentDisplay?id=1942360.1>

Managing Cases

Understanding the Configurable Case

In PeopleSoft CRM one Case component supports all PeopleSoft CRM Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education applications, as well as the related industry solutions.

The system stores the display template family code within the Case component. The display template family code identifies the type of the Case and may provide several display template IDs that a user can choose from.

Display template IDs control the appearance and behavior of the Case component and its pages to support the varied business needs of call centers. An implementer can choose to show or hide pages, sections, and fields. An implementer can also control field labels.

Understanding Case Access

This topic discusses:

- Case creation.
- Case retrieval.
- Saved searches.

Related Links

[“Understanding 360-Degree View Setup” \(Application Fundamentals\)](#)

[Managing Related Cases](#)

[Defining Call Center Business Units](#)

Case Creation

You can create new cases in several ways:

- Navigate to your PeopleSoft call center application (Support, HelpDesk, HR HelpDesk, or Analyst Service Center) and select Add Case.

When users want to add new cases, they are taken directly to the Case component in Add mode. Users can search for customers or employees directly on the Case page, thus increasing efficiency and usability. Users can also enter information about the case before identifying the customer.

As delivered, the Analyst Service Center provides creation and retrieval of three different types of case (each based on a separate Display Template ID). These cases are tailored for Information

Technology (IT)-related cases, non-IT (support) cases, and blended cases (which may be used to track either IT or non-IT cases).

Note: You can also use the **Support Center**, **Help Desk Center**, or **HR Help Desk Center** links from the Home page to navigate through the applications and add new cases.

- Use Quick Create functionality.

Use the Quick Create function to create new customers, consumers, contacts, workers, and POIs quickly.

- Use a computer telephony integration (CTI) system to identify a caller.

The CTI system enters caller information on the 360-Degree View page. From there, you can access the Case page to create a new case. The system populates customer or contact information on this page from the 360-Degree View page.

Note: An agent may also use the 360-Degree View page without CTI to gather information about the customer before entering a new case.

- Clone an existing case by clicking the **Clone Case** button on the case toolbar.

Use this method when the new case is substantially similar to another case.

- Create a new case from the Related Cases page of an existing case.

Use this method when the new case is related to an existing case. This method enables you to establish the relationship between the cases at the same time that you create the new case.

Using this method, you can select the type of information to copy to the new case. If you do not copy caller information, you can identify the caller using the appropriate fields on the new Case page.

- If an implementer enables the Agent - My Cases pagelet, agents can create cases without leaving their personal case access portal.
- In the email workspace, agents can make use of email handling options to create and associate a case to an email to support the completion of the correspondence.
- If an implementer enables the configuration option for a group worklist to create cases for new inbound email, the system creates a case for each incoming unstructured email that ERMS receives and routes to that group worklist.

See “Group Worklist Page” (Automation and Configuration Tools).

- If enabled at the HCM installation level, the CRM system automatically creates HR HelpDesk cases when the job-related or personal data is updated in the HCM system it integrates with. See [Understanding Automatic Case Creation For HCM Updates](#)

Note: To generate a case ID before a case is saved, implementers and administrators can select the **Case ID Before Save** check box on the Call Center Definition - Options page. This feature is useful if you want to provide customers with a case ID before the agent enters all the problem information. Note that if the agent provides the customer with a case ID for their reference and the agent tries to save a case and is not able to, the customer has a case ID that is not recorded in the system.

Default Contact Information

When you create a new case, the system enters default contact information for the caller.

For PeopleSoft Support, when a user selects both the customer and contact, the contact information is obtained from the contact's preferred primary phone and email information.

For PeopleSoft HelpDesk and HelpDesk for Human Resources, a user selects an employee rather than a customer and contact. They can also enter an alternative contact in addition to an employee. In this case, the contact information comes from the alternative contact instead of the employee.

For PeopleSoft Service Center for Higher Education, user may select an individual consumer (a category which includes individual students), a company and contact, or an employee (staff or faculty member).

Case Retrieval

Access an existing case directly from your My Cases pagelet or use the Case Search page. You can perform a search based on case information (such as the case number) or caller information.

If you know the case number, you do not have to identify the business unit before searching. If you are searching based on other criteria, enter a business unit before performing the search.

Note: The number and type of information fields on the Case Search page that are used to search for cases is determined in the Configurable Search Definition, which is associated to the Display Template.

See “Understanding Display Templates” (Automation and Configuration Tools), “Understanding the Configurable Search” (Automation and Configuration Tools).

If you use CTI to access the Case page, the system normally bypasses the Case Search page because the CTI system provides the data that would otherwise be found through the search mechanism. However, if a caller provides an invalid case number, the system cannot go directly to the Case page. Instead, it displays the Case Search page and enters the data that is provided by CTI into the search fields. Because the appearance of the Case Search page indicates that the case number is invalid, you must delete the invalid case number before performing a search.

Note: When a case is secure, only agents in the assigned provider group are authorized to open the case. If you use CTI or the 360-Degree View page to access the Case page and the system tries to send the case to an agent who is not authorized, the agent receives a message stating that he or she is not authorized to open the case. To avoid this situation, consider the secure case scenario when you configure your routing rules.

Related Links

[Understanding Call Center Business Units](#)

“Understanding CTI” (PeopleSoft Multichannel Applications)

“Using PeopleSoft Support Pagelets” (PeopleSoft Portal Pack)

Saved Searches

Saved searches enable you to reuse case search criteria. The system saves searches under your user ID by maintaining separate lists of saved searches for each user.

The behavior of the saved search depends on how the search page was set up on the Configurable Search Setup page. The system administrator can choose to populate the results grid automatically with the most recently used search criteria or with the user's default saved search. If the administrator selects the check box that enables users to choose how the results grid is initialized, then users have the option to:

- Save search criteria.
- Personalize available search fields.
- Decide how the results grid is initialized.

Related Links

“BO Searches on Configurable Search Pages” (Automation and Configuration Tools)

Understanding Case Management

This topic discusses:

- Case page activities.
- Quick codes.
- Case information security.
- Case assignments.
- Case visibility
- Case closure.
- Case toolbar functions.
- Toolbar functions.
- Background processing.

Note: This chapter discusses Case page activities. Subsequent chapters discuss additional case processing that take place on other pages in the Case component.

Case Page Activities

Depending on the display template, the Case page can be divided into the following sections:

Note: Sections marked with an asterisk (*) are delivered enabled when you first install the application. The display template controls the visibility of the other sections.

- Customer information section. *

This section is titled Employee Information for PeopleSoft HelpDesk applications.

- Academic Information section (associated only with PeopleSoft Service Center for Higher Education).

- Problem section. *
- Case Information section. *
- Actions section. *
- Add a note section.
- Incident address section.

See [Understanding Processing a Case](#).

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

Customer Information Section

In PeopleSoft Support, the case's Customer Information section contains customer fields. The same section for a PeopleSoft HelpDesk or HelpDesk for Human Resources case contains employee fields.

In Service Center for Higher Education, you can search for a company (and company contact), consumer, or worker. Note that students (constituents) have the role of consumer within the Service Center for Higher Education application, while staff and faculty have the role of worker. An individual with the role of company contact who also has the role of consumer or worker will show up multiple times in the search results (both as an individual and as a representative of the company). However, individuals who are not company contacts will show up only once in the search results, even if they have both the role of consumer and worker.

Consider the following when using the Customer Information section:

- If you are searching for a company, you can enter a partial value in the **Company** field and click the **Search** button.

The system returns a list of companies that begin with the value you entered in the **Company** field. If only one company matches your search, the system displays a page with all of the contacts for that particular company. When creating a case for a company, you must identify a contact person. A contact person is optional if you are creating a case for a consumer.

- If you are searching for a consumer, you can enter a partial value in either the **First Name** or **Last Name** field and click the **Search** button.

Do not enter anything in the **Company** field.

- If you want to edit a contact's contact method for the case, click the **Edit** link to launch the Edit Contact Information page.

This page lists the contact information for the selected contact. The system lists only address information for HelpDesk for Human Resources cases.

- Business Object Search functionality controls the appearance of customer search fields and some of the other fields.

Note: For PeopleSoft HelpDesk applications, the appearance of certain fields is controlled by the secure worker role.

See “Understanding BO Search and Quick Create Setup” (Business Object Management).

- If a case is created automatically by the system for an inbound email message (a feature that can be enabled in any group worklist definition with the installation of ERMS), the email sender (identified by the email address) is populated as the customer contact of the case.

If the email address does not match any of the customer record in the CRM system, one of these two things happens based on the setup of the mailbox to which the inbound email is routed—either a new customer (a Person record) is created using the email address and becomes the contact of the case, or the *Anonymous User* person record is used as the customer (consumer) of the case. On the other hand, if multiple matches are found for the email address, the **Select Sender** link appears in the Customer Information section, indicating that the call center agent needs to choose an email sender as the case customer.

A case customer must be identified before a case can be saved, unless the **Anonymous Caller** option is selected on the case.

See “Group Worklist Page” (Automation and Configuration Tools).

The Customer Information Section is grouped using an expandable group box layout. Use the display template to control how the fields appear in each section.

Note: If you select an incorrect company, you can search again to select the appropriate company. For PeopleSoft HelpDesk customers, one person can enter a case on behalf of another person. You can select the employee associated with the case, select an alternative contact, and then click the **Edit** button to enter contact details for the case.

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

Academic Information Section

This section is enabled for cases in Service Center for Higher Education. It displays a summary of the academic information (such as institution, program and plan) that is associated with the constituent. The fields in this section are not editable (any required updates to the information should be processed in the PeopleSoft Campus Solutions application).

Because individuals may be linked to more than one institution, program, plan, or sub-plan, the information in this section is presented in a scroll area, so that multiple sets of information may be viewed.

Problem Information Section

This section discusses two fields: **Summary** and **Description**.

The **Summary** field is required. The system can be configured so that values for the **Summary** and **Description** fields can be entered by default on the Case page when the user selects a quick code. If a problem summary is already entered on an existing case, a quick code will not overwrite the **Summary** and **Description** fields unless the overwrite check box is selected for either the **Summary** or **Description** fields in the quick code. In this case, you can overwrite the values for the **Summary** and **Description** fields even if these fields are already populated.

Note: Call center agents can also use text trays and quick keys to automatically fill static and dynamic data into the **Description** field.

See “Understanding the Text Tray” (Automation and Configuration Tools).

Case Information Section

The fields in the Case Information section are grouped using the configurable Embedded Tabs section layout. By default, the system displays the **Main** and **More** tabs. Use the display template to determine the number of tabs, their labels, and the fields that you want to appear.

This section discusses how to:

- Secure a case.
- Enable the creation of a case with an anonymous caller.
- Enable the creation of a case that specifies a site as the customer rather than a person or company.

This capability is useful for service calls that must be specified by location rather than by a contact name or billing entity.

- Display the business unit associated with the case.
- Select a quick code.

You can configure a quick code to populate other fields.

- Categorize a case.

The **Category**, **Specialty Type**, and **Detail** fields can affect the way in which the system assigns provider groups and agents to the case.

- Assign a case.

You can assign a case in many ways. You can configure the system to automatically suggest a provider group and agent.

- Associate and describe a product for which support is extended.

You can record its placement within a product hierarchy, serial number, where it was purchased, and whether it is installed.

- Record asset information.

You can track company equipment with identification numbers and track whether the equipment is installed.

- Track the reported problem.

You can prioritize and categorize problems by type and severity, create and assign error codes and messages to attach to the problem, and record the response and outcome.

- Perform an entitlement search.

PeopleSoft call center applications enable you to set up agreements and warranties that govern and track a customer's or an employee's entitlement to support. To control the way the system searches for agreements, you can use the configuration options available on the Agreement Search Configuration page. You can also use the Active Analytics Framework (AAF) to set up automatic agreement searches.

See “Understanding Agreements and Warranties” (Application Fundamentals).

- Authorize a credit card.
- Review response times.

You can view the service-level agreement information about expected and actual response and restore times. A customer's entitled response and restore time takes a business's hours of operation into consideration. The system uses the same logic for holiday schedules. If an agreement is entitled with regular hours of operation but the business is closed on public holidays, the entitlement takes the holiday schedule into account. On the Service Level page, you can use the **Holiday Schedule** field to select the holiday schedule that you want associated with the service level. The system provides the holiday schedule by default to the agreement line when the service level is specified.

- Review survey scores.

If you have permission to view the **Survey Score** field, you can review the scores generated by the surveys that were sent to customers by email. You can also review the actual survey by clicking a link on the Related Actions page in the Case component after the customer has filled out the survey. This field, however, does not appear on the page unless you enable it on the Display Template - Page Definition page. You must also sign in as a user with permission to view this field; otherwise, it does not appear on the page. You can set up your system so that an agent can send a survey manually to a customer's email address, or you can use AAF to automatically send surveys to customers when agents close cases. To run and view reports that show survey scores for particular agents or types of cases, refer to the documentation for your PeopleSoft CRM Online Marketing application.

Actions Section

The link categories that you or your implementation team set up during installation appear in the Actions section on the main Case and Summary pages. You can link to pages such as those in the HR database (used in HelpDesk for Human Resources) or the PeopleSoft Campus Solutions application (used in PeopleSoft Service Center for Higher Education), or you can link to related actions, business projects, change requests, and so on.

Using AAF policies or by selecting a quick code, you can configure your system to automatically suggest an action. You also can manually select an action from the Actions section.

Only those link categories and definitions that are associated to a link group—which is associated to a display template—appear in the Actions section.

See [Link Group Page](#).

Add a Note Section

The Add a Note section, which is delivered as hidden, provides a note field on the main Case page. Each time users open a particular case, they can only add one note on the Case page. Once a note has been added on the Case page, it may be edited there, if desired, until the user exits the case. However, to add additional notes without exiting and re-opening the case, the user must use the Notes page. On the Notes page, agents can always add new notes, as well as view and edit existing notes.

Note: To create a note using text tray functionality, you need to be on the Notes page.

See [Adding Notes and Attachments](#).

Incident Address Section

This section is delivered hidden. If you want to make the Incident Address section visible, modify the display template to enable this section.

In the **Incident Address** group box, you record information about the location of the incident.

In this group box, you can:

- Enter either a street address or the intersection for the incident.
- Describe additional information about the location using free-form text.

Related Links

[Basic Link Setup](#)

Quick Codes

You can use quick codes to populate these fields on the Case page:

- **Note** (Summary and Description)
- **Problem** (Summary and Description)
- **Case Status**
- **Case Priority**
- **Case Impact**
- **Urgency**
- **Case Severity**
- **Provider Group**
- **Assigned To**
- **Case Type**
- **Case Subtype**
- **Category**
- **Specialty Type**
- **Detail**
- **Error Code**
- **Error Message**
- **Interested Parties**
- **Product ID**

- **Product Group**
- **Suggested Action** (Link Category, Version, Link Name)
- Solution and solution status
- **Name Change**
- **Location Change**
- **Early Retirement**

Case Information Security

You can control the visibility of the **Secured** check box by using a display template. When an agent determines that a case is sensitive, he or she can select the **Secured** check box in the Case Information section of the template to specify that the case should be viewed only by individuals associated with the provider group on the case.

When a case is marked secured, the agent must specify a provider group before saving the case. Once the agent secures the case, it is associated with the provider group. Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, the agent cannot access the secured case.

Note: Security is implemented on specific pages throughout the system. If your organization modifies the system to show case summary information on additional pages, you must secure the information appropriately.

The word *Secured* is substituted for the case summary on the following pages:

- Case Search.

Secured appears in the **Problem Summary** field of the search results grid both when accessing a case and when searching for a case to relate to another case.

Note: The other fields in the search results grid display actual case data; therefore, agents can view the case status or the assigned agent without accessing the case. This limited visibility enables even non-authorized agents to provide limited support when callers inquire about a secure case. The link to access the case, however, is disabled for unauthorized users.

- 360-Degree View for authorized and unauthorized cases.

The 360-Degree View page for PeopleSoft HelpDesk for Human Resources and the Constituent 360-Degree View page for Service Center for Higher Education each have two case nodes, one for cases that cannot be accessed (unauthorized) and one for those that can (authorized).

Secured appears if the Case node in the action tree is configured to show the case summary. You can also configure the unauthorized node to show the summary of the secured case. The 360-Degree View page for PeopleSoft HelpDesk for Human Resources and for Service Center for Higher Education is delivered showing only the case status and count. For 360-Degree Views that are not related to these two applications, secure cases are not hidden or disabled on these pages or sections.

- Related Cases.

- Solution - Related Actions.
- Solution pages.

Secured appears in the search results grid.

- Worklist.

Secured appears if the agent is not in the provider group.

- Email notifications (automated and manual).

The PeopleSoft system does not prohibit users from emailing case information to other users who don't have access to the case (for example, through the Outbound Notification page). The summary does not change for email notifications about secured cases.

Note: When an agent prompts for cases, the system displays only those cases that the agent is authorized to access. To access a secured case, the agent must be a member of the provider group associated with the case.

Configuration Issues for Secured Cases

To avoid sending out information about secured cases when you are setting up AAF policies, business projects, workflow actions, and email templates, use the **Secured Case** field (SECURE_CASE_FLG) on the Case page (RC_CASE) to define record field conditions.

For example, suppose you want to suppress secured cases from being viewed by unauthorized users. You can define an event to perform a check for a value equal to *N* on the **SECURE_CASE_FLG** field before displaying or distributing case information.

Note: Secured case functionality can be used by any call center application. However, this functionality is delivered only for PeopleSoft HelpDesk for Human Resources. The secure case flag is part of a condition to make sure you don't send out secure information. AAF policies do not automatically treat secured cases as special.

Case Assignments

You can assign a case to any worker except future-dated workers. The worker to whom a case is assigned is the case owner, even if other agents or specialists are helping the assignee.

You can also assign cases to provider groups rather than to individual agents. Provider groups are pools of agents with something in common, like agents who support a certain product or work at a particular call center.

You can assign cases by:

- Entering the provider group or agent name manually.
- Invoking the assignment engine, which suggests an assignee.

The assignment engine attempts to match the person or provider group with all of the competencies associated with the case category, type, or detail, whichever level is appropriate for the case.

Additionally, because you can associate competencies with problem types, the assignment engine attempts to match the person or provider group with the competencies listed for the problem.

You can set up the assignment engine to assign cases to provider groups according to the competencies associated with problem types and then to assign cases to agents according to the competencies associated with category, type, and detail.

See “Understanding Assignment Searches” (Application Fundamentals).

Note: Based on how you configure the system, the assignment engine will also use product, customer, region, and location information.

- Entering a quick code.

You can enter a quick code that is associated with a default assignee (either a provider group or an agent).

- Having the system assign the case at save time.

Auto-assignment options that are configured in the Call Center Business Unit component occur only if you have not already assigned the case. If you use AAF policies to assign the case, the event definitions determine the conditions under which the assignment occurs.

Assignment Notifications

The PeopleSoft system delivers call center workflow to send notifications when a case is assigned or reassigned.

If you assign cases to provider groups (without specifying an agent within the group), you can use AAF policies to send an assignment notification to the provider group's worklist. Usually, the worklist monitor assigns the worklist item, the case, or both to an individual. The PeopleSoft system is not delivered with this workflow turned on, however. To use this functionality, you must reset the end date in the AAF policy.

Related Links

[Defining Call Center Business Units](#)

“Understanding Provider Groups and Group Members” (Application Fundamentals)

“Understanding Assignment Searches” (Application Fundamentals)

“Understanding AAF” (Automation and Configuration Tools)

Case Visibility

To prevent employees from viewing sensitive case information (for example, grievances) through the HelpDesk self-service applications, the PeopleSoft system includes a value called *Internal, exclude Case Contact* in the **Visibility** drop-down list box on the main Case page.

When a user selects *Internal, exclude Case Contact*, the employee who is the subject of the case is unable to view the case through the HelpDesk self-service application.

The person who reported the case (Reported By) can view it in the self-service application if the case is not secured. When a case is secured, the Reported By person will no longer be able to view the case in the self-service application.

When an agent selects the *Internal, exclude Case Contact* visibility value and clicks the **Notification** button, the system displays a warning message to the agent that the employee does not have visibility to this case. In this situation, you would not want to send a notification to the employee.

The system does not display the employee name and email address in the **Recipients** grid on the Outbound Notification page.

The Case Contact role query has been modified so that it won't return the case contact when the agent selects the *Internal, exclude Case Contact* visibility value. This modification prevents the agent from sending a notification to the employee in question.

To update a secured case when the visibility is *Internal, exclude Case Contact*, the PeopleSoft system has a new policy called Case Visibility Changed.

When a case is secured, an agent that does not belong to the provider group can't open the case. This safeguard prevents the agent from opening the case from the 360-Degree View page and discussing it with the employee in question.

Note: This feature is only applicable to PeopleSoft HelpDesk and HelpDesk for Human Resources.

Case Closure

The **Case Status** field on the Case page shows where the case is in its life cycle. You close a case by selecting the appropriate status in the **Case Status** field.

Case status values vary by implementation, but all case statuses fall into one of these categories:

- Open
- Closed
- On Hold
- Canceled

These processing rules are based on the case status categories:

- Your business unit settings determine whether you can reopen canceled or closed cases.

You can also set up the Call Center Definition - Case Defaults page to change the status automatically when an agent obtains a successful resolution.

See [Understanding Call Center Business Units](#) and [Understanding Display Templates](#).

- When you close a case, the current date and time are entered in the **Closed Date** field; if you reopen the case, the **Closed Date** field is cleared.
- If a case is associated with a solvable action, you can close the case by selecting the action.
- You cannot close a case until it has either a resolution associated with it or a solvable action associated with it.

You can set up your system to prevent the closing of cases unless there is a business project associated with the case. To do this, however, the business project related action must be marked as **solvable** on the Link Definition page. If the business project is marked as **solvable** and it is associated with the case, the business project doesn't need to be closed before you can close the case.

- You can set up the system at the business unit level to allow cases to be resolved after sending outbound notifications from them.

When this option is selected, the **Send and Solve** toolbar button appears on the Outbound Notification page. When the user finishes composing the message and clicks the button, the system sends the notification out to recipients and solves the associated case transaction by setting its status to the predefined resolved case status (for example, *Closed - Resolved*).

If the outbound notification requires approval from a supervisor, the system resolves the associated case upon receipt of the approval from the supervisor.

See [Business Unit - Options Page](#).

When cascading statuses through related cases, these rules also apply:

- Changing the parent case's status changes the status of all child cases unless:
 - The child case is associated with an open case.
 - The child case is in a closed or canceled status that is not the same as the parent's original status.
- You can close a case using more than one resolution.
- Closing a parent case cascades the successful solution to the child cases that are associated with the parent case.
- Reopening a parent case changes the successful solutions in the child cases to failed solutions.
- When a case is closed, it becomes read-only except for the **Case Notes** and **Resolution Status** fields.

This flexibility accommodates instances for which multiple resolutions can close a case for that business unit.

Note: A solvable action will not cascade to the other cases, but a successful resolution will.

Related Links

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

“Understanding Case, Service Order, and Defect Resolution” (PeopleSoft Services Foundation)

“Understanding Entitlement Searches” (Application Fundamentals)

Case Toolbar Functions

The toolbar at the top of all of the pages in the Case component provides access to several common activities. The toolbar is configurable; these activities are available only if the toolbar is active.

See “Understanding the Configurable Toolbar” (Automation and Configuration Tools).

The PeopleSoft system delivers configurable toolbar definitions, one for each application.

Common Call Center Toolbar Buttons

The configurable toolbar in all call center applications contains these buttons:

- **Print**
- **Spell Check**
- **360-Degree View**
- **360-Degree Search**
- **Text Tray**
- **Notification**
- **Email**
- **Time Entry**
- **Search**
- **Next**
- **Add**
- **Update**
- **Clone Case**
- **Correspondence**

Additional Toolbar Buttons for PeopleSoft Support

In addition to the common buttons, the toolbar for PeopleSoft Support contains these buttons:

- **Upsell**
- **Order**
- **Map Dashboard**
- **CTI Dialout**

If customers implement their own CTI switch, they need to implement a new Javascript function that is specific to the CTI switch. PeopleSoft CRM delivers a Javascript function that works with the delivered CTI definitions, so when an agent clicks the button, an outbound call is made for the phone number listed on the case. If customers have a specific CTI switch implementation, they must add a new Javascript function for the implementation (the Javascript function file should be located in the <PS_HOME>/cs/ps/pCti directory) and register it in the CTI component of the CRM system.

See “Setting Up CTI System Definitions” (PeopleSoft Multichannel Applications).

- **Get Offer/Promotions**

Note: You must use PeopleSoft's AAF functionality to activate the Get Offer/Promotions button; this functionality is not delivered. When AAF policy conditions are met, the existing Upsell Configuration on Case action displays the **Get Offers** icon on the Case toolbar. This action is modifiable to present the **Get Offers/Promotions** button based on rules that are evaluated by the existence of a third-party optimization engine. Agents can also initiate branch scripts associated with the offer for scripted selling.

See “Understanding AAF” (Automation and Configuration Tools).

See [Understanding Link Setup](#).

Additional Toolbar Buttons for PeopleSoft HelpDesk

In addition to the common buttons, the toolbar for PeopleSoft HelpDesk contains these buttons:

- **Asset Discovery**

Provided that system and data integration has been accomplished, this button launches an asset management application, which passes the desired asset information to the application for reporting.

You can also launch asset discoveries from the:

- 360-degree view of an employee.
- Case toolbar.

- **Remote Control**

The **Remote Control** button launches a third-party remote control process that enables an IT agent to:

- Remotely query for data from an installed product or asset.
- Run a process to remotely take control of an employee's computer to resolve a problem.

See [Integrating with Third-Party Asset Management Applications](#).

Additional Toolbar Buttons for PeopleSoft Service Center for Higher Education

In addition to the common buttons, the toolbar for PeopleSoft Service Center for Higher Education may contain these buttons (depending on whether the user has accessed an IT, non-IT, or blended case):

- **Upsell Opportunity Alert**
- **Order**
- **Map Dashboard**
- **CTI Dialout**

If customers implement their own CTI switch, they need to implement a new Javascript function that is specific to the CTI switch. PeopleSoft CRM delivers a Javascript function that works with the delivered CTI definitions, so when an agent clicks the button, an outbound call is made for the phone number listed on the case. If customers have a specific CTI switch implementation, they must add a

new Javascript function for the implementation (the Javascript function file should be located in the <PS_HOME>/cs/ps/pCti directory) and register it in the CTI component of the CRM system.

See “Setting Up CTI System Definitions” (PeopleSoft Multichannel Applications).

- **Asset Summary**
- **Remote Control**

The **Remote Control** button launches a third-party remote control process that enables an IT agent to:

- Remotely query for data from an installed product or asset.
- Run a process to remotely take control of an employee’s computer to resolve a problem.

Notifications

The **Notification** toolbar button provides convenient access to case-related communication and worklist tasks. Clicking this button:

- Launches the Outbound Notification page for users to compose and send email and worklist notifications.
- Launches the email workspace for users to respond to existing email messages that are associated with the case. Email workspace can be used for sending new adhoc emails based on system setup.

This function is available with the installation of Multichannel Communications.

Time Tracking

When you create a new case, the system creates a time record for the case. For the system to do this, you must first set up autonumbering for time records.

Important! Because the system creates a time record for every case, you must set up autonumbering for time records even if you don't track the time that you spend working on cases.

To track the time that you spend working on a case, click the **Track Time** button in the case toolbar to access the Manage Time page.

Use the Manage Time page to record the start and end times for each block of time that you work on the case. Unless the case is resolved during the first call, separate time records will exist for the different blocks of time spent working on the case. Every person who works on a case needs to record time separately.

The time entry record is created the first time that the case is saved in the agent-facing component. For cases created elsewhere (for example, cases created in self-service, through cloning, or through related case functionality), the system does not create the time record until the case is accessed and saved in the agent-facing component. If a user clicks the **Track Time** button for a case that does not yet have a time record, the system prompts the user to save the case first.

When you add a new row to the time record, the system enters the name of the currently assigned agent to that row. If your name does not appear as the currently assigned agent, change this value to your own name.

The system enters the current date and time as the start time. These default values are helpful for agents who create the time record when they start working on a case and then return to the time record later to enter the end time. If you create the record at the end of a block of time when you've worked on the case, you must override the default start time.

Note: If an existing case has time recorded, and an agent subsequently changes the Business Unit on the case, the existing time entries will be updated to the new Business Unit.

Upsell Opportunities

This functionality is available only in PeopleSoft Support and PeopleSoft Service Center for Higher Education.

If a caller reports a problem with an old or superseded product, you might want to recommend that the caller upgrade to a newer product. A flashing button, which appears on the toolbar on the Case page, alerts agents to a potential upsell opportunity.

The flashing button is triggered based on conditions set up in an AAF policy. For example, you can trigger the upsell toolbar button to flash when a customer is identified or when a product is selected and the case has a specified priority.

The Branch Script tool is used to recommend a product to upsell. Branch scripts are associated with specific products. Clicking the button launches a branch script and adds it to the list of related actions for the case.

Note: You can also control how the toolbar buttons behave using AAF policies.

See “Action Configuration Page” (Automation and Configuration Tools).

See “Understanding AAF” (Automation and Configuration Tools).

From the Actions section on the Case page or from the Related Actions page, you can transfer directly to the Order Capture page. Whenever possible, the system maps branch script answers to corresponding fields on the Order Capture page. This mapping is accomplished using variables associated with the branch script. For example, the system maps the **Product** field (if it appears) to the Order Capture page.

Text Trays

Call center agents can use text trays and quick keys to auto-fill static and dynamic data, reply to emails, create text for ad hoc notifications or emails, or create notes about a case.

You can use both public and personal quick keys in text tray-enabled text fields within transaction pages. You can also create and maintain your own set of personal quick keys.

Administrators and implementers can manage and create public quick keys. They can create two types of quick keys:

- Dynamic quick keys are comprised of static text and a dynamic token, which pulls the value from the database.
- Static quick key always resolve to straight text.

You can create quick key categories and edit existing and delivered categories, edit existing quick keys, group quick keys into categories, and determine the key sequence for hot keys.

You can use the Quick Code functionality to auto-populate these fields in PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources:

- **Problem - Description** field on the Case page.
- **Details** field on the Notes page.

For example, you can have a quick code that automatically fills out the case and inserts text into the **Problem - Description** field. Included in this text could be the #123 quick key code, which would resolve to text through the Text Tray functionality.

See [Quick Code Page](#).

See “Understanding the Text Tray” (Automation and Configuration Tools).

Toolbar Functions

Access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, or Service Center for Higher Education. The toolbar at the top of the Case page and all pages in the Case component include a row with buttons and a time zone control.

The toolbar configuration controls which buttons appear. As delivered, the button row in the toolbar displays some or all page elements. Page elements that are common across all applications are documented in [Automation and Configuration Tools](#).

See “Understanding the Configurable Toolbar” (Automation and Configuration Tools).

Term	Definition
	Click the Print button to launch a separate browser window that you can use to print case information and change print options.
	Click the Time Entry button to access the Manage Time page, where you can track the time that you spent working on the case. You are prompted to save the case before you access the Manage Time page. This button appears only after an agent saves the case for the first time.
	Click the Text Tray button to launch the Text Tray page, where you can select a quick key that will automatically enter pre-written text into the Description field on the Case page and the Detail field on the Notes page in the Case component.
	Click the Update button to access the Case Search page in Find an Existing Case mode. Note: The Configurable Search Setup pages determine what result set (if any) appears when you click the Update Case button. See “Configuring Searches” (Automation and Configuration Tools).

Term	Definition
	Click the Clone Case button to create a new case with the same caller information and problem information as the existing case. The system creates the new case and displays a message providing the new case number. After you click OK in the message dialog box, the system displays the new case in a new browser window. Agreements, warranties, solutions, notes and attachments, case history, related cases, related actions, and interested parties are <i>not</i> copied to the new case, and the Resolved by First Contact check box is always clear in the new case.
	Click the Order Capture button to access the Entry Form page in the Order Capture component. The system automatically populates the customer and product data on the Entry Form page.
	Click the Upsell button to run the upsell script. This button appears only if an upsell script is associated with the product and if other business unit-specific upsell criteria are met. This icon changes to a coin based on the base currency. The upsell functionality is specific to PeopleSoft Support.
	Click the Asset Summary button to launch an asset management application, which passes the desired asset information to the application for reporting.
	Click the Remote Control button to launch a remote control process that enables an IT agent to remotely query for data from an installed product or asset or to run a process to remotely take control of an employee's computer.
	Click the CTI Dialout button to launch the Outbound Call page to enable a user to direct the CTI console to dial a telephone number displayed on that page. Outbound calling works only when the CTI console is enabled and the user has registered with the CTI vendor.
	Click the View Worklist button to launch the My Worklist page. The agent uses the Worklist page to efficiently manage personal work tasks and responsibilities. Note: You must set up this button on the Toolbar Definitions pages during setup. See “Understanding the Configurable Toolbar” (Automation and Configuration Tools).

Term	Definition
History	Select a value and click the green arrow to return to the selected page. This field appears if you access the Case page through a page other than the Case Search page.
Current user time	Displays the time that you opened the component. This field is informational only; it is not saved with the case.
Time zone	Select the time zone in which to display the times on the page. Values are: <i>My Time Zone</i>: The current user's local time zone. <i>Customer</i> (PeopleSoft Support only): The time zone that is associated with the caller. <i>Employee</i> (PeopleSoft HelpDesk and HelpDesk for Human Resources only): The time zone that is associated with the caller. <i>Assigned</i>: The time zone of the agent who is currently assigned to the case. <i>Previously Assigned</i>: The time zone of the agent who was previously assigned to the case.

Related Links

[Reviewing Case History](#)

“Understanding Manual Notifications” (Automation and Configuration Tools)

“Understanding the Configurable Toolbar” (Automation and Configuration Tools)

Background Processing

This section discusses case processing that is transparent to the end user.

Active Analytics Framework (AAF)

PeopleSoft AAF is a suite of tools comprising a closed-loop decision-making system where you can address specific business issues. Applications can respond when certain conditions are met and certain actions are recommended.

Actions include giving a priority service or a better discount for high-value customers, identifying fraudulent transactions, and displaying alerts and warning messages.

At runtime, applications send requests to the AAF decision engine to evaluate all of the policies pertaining to a trigger point. For policies whose conditions are evaluated as true, the system invokes their associated actions.

Your organization can set up AAF policies to trigger various actions under specified conditions. The AAF decision engine can perform several actions that are transparent to the person who triggers the action.

AAF policies can:

- Send general-purpose notifications.
- Send notifications related to entitlements.

Agreement lines provide customers with specific entitlements such as guaranteed response times and recovery times. Each entitlement can be associated with a workflow rule that sends a notification at a predetermined time. Typically, the notification informs you of an impending deadline.

- Track consumption of prepaid cases under an agreement line that covers a specific number of prepaid cases (PeopleSoft Support only).
- Cascade the case status and resolution information to child cases.
- Send notifications to agents and managers when a case is escalated.

When a user clicks the **Escalate Case** button on the Case page, the system displays a message. If the user clicks **OK**, the system saves the case and sets off one of these trigger points in AAF: *When a Support Case is Escalated* or *When a Help Desk Case is Escalated*.

The AAF decision engine also triggers these actions, whose effects are visible in the case where they are triggered:

- Suggest an action.
- Display alert messages as well as cross-sell and upsell notifications.
- Recommend a solution or a product in an upsell or cross-sell situation.
- Log entries in the Events tab of the Case History page.
- Log entries in the Events tab of the Product History page of an installed product, service, or asset.
- Log entries in the Events tab of the Change Request History page.
- Instantiate a business project.
- Update information on a Case page.
- Display a new page from a link (not available for self-service cases.)
- Display the **Upsell** button in the toolbar.
- Set the display template ID.

See “Understanding AAF” (Automation and Configuration Tools).

Interactions

Interactions are records of communication between you and your customers. Interactions can be related to transactional objects such as cases, service orders, and so on. Related transactions are considered subinteractions.

You don't need to set up workflow to capture interactions. The system captures them automatically based on certain actions that you perform.

The system records inbound interactions for a case when:

- You create or access a case from the 360-Degree View page.
- You create or access a case through the CTI system.
- A customer or employee uses self-service pages to access, update, or add a case.

The system records outbound interactions for a case when:

- You create correspondence for a case.

Note: When an agent sends an email from a case to an employee, the system creates an interaction only if the employee is the customer, contact, or alternate contact for the case.

- You create notifications for a case.

Related Links

“Understanding AAF” (Automation and Configuration Tools)

Managing Basic Case Information

This topic discusses how to manage basic case information.

Note: The information that is available on the Case page is conditional and is based on the template that you or your implementation team have assigned to the business unit.

Pages Used to Manage Basic Case Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Case Page</u>	RC_CASE	Add and manage PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education cases. You can also access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education from the 360-Degree View page by selecting <i>Add Case</i> from the Actions drop-down list box.
<u>Match Results Page</u>	RC_MATCH_RSLT_SEC	View a list of matching cases based on the Case Match Definition. Where appropriate, select a related case from the match results set. When selected, the case will appear in the Related Cases grid.

Page Name	Definition Name	Usage
<u>Outbound Notification Page</u>	RB_EM_OB_NOTIFY	Send a manual notification. If you have purchased PeopleSoft ERMS, you can use the Notification button on the toolbar to compose new email messages using the Outbound Notification component or respond to existing email using Email Workspace. The system automatically populates the contact and interested parties of the case in the recipient list on the Outbound Notification page.
<u>Installed Product Viewable Hierarchy Page</u>	RF_INSTPROD_VH_SEC	View the installed products that meet the criteria available on the Case page. For the installed products that the system returns, the page displays parent, child, and sibling relationships to other installed products.
<u>Entitlement Match Page</u>	RF_ENTL_LIST_SEC	Select from a list of warranties or agreement lines that may cover the case.
<u>Entitlement Details Page</u>	RF_VIEW_ENTL_SEC	View the entitlements associated with a case. This link is available after an agent selects an agreement line or a warranty.
<u>Provider Group Summary Page</u>	RF_ASSIGN_PG_SEC	Select a provider group from the search result that can be assigned to the case. Groups are ranked by their fit score, an evaluation of how well each group matched the case criteria.
<u>Candidate Summary Page</u>	RF_ASSIGN_LIST_SEC	Select a worker from the search result that can be assigned to the case. Candidates are ranked by their fit score, an evaluation of how well each candidate matched the case criteria.

Case Page

Use the Case page (RC_CASE) to add and manage PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education cases.

You can also access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education from the 360-Degree View page by selecting *Add Case* from the **Actions** drop-down list box.

Navigation:

- **Support > Add Case > Case**
- **Support > Search Cases > Case**
- **HelpDesk > Add Case > Case**
- **HelpDesk > Search Cases > Case**
- **HR HelpDesk > Add Case > Case**
- **HR HelpDesk > Search Cases > Case**
- **Analyst Service Center > Add Case > Case**
- **Analyst Service Center > Search Cases > Case**

This example illustrates the fields and controls on the Case Page.

Save

Print

960

Find

Case ID 220592

Employee ID KU0010

Problem Summary Marriage checklist

Case Status Open - Research

Employee Antonio Santos

Contact Method crm_worker_30@ap6023fems.us.oracle.com

Personalize

Case Details

Solution (0)

Case Summary

Notes (0)

Tasks (0)

Case History

Related Cases (0)

Related Actions (2)

Problem Information

*Problem Summary

Marriage checklist

Description

Employee is getting married. Needs a checklist of HR and Payroll changes that are required and optional.

Case Information

☐ Global Case

☐ Secured Case

*Case Status Open - Research

Assigned To George DeAngelis

Case Priority Medium

Case Severity One Affected

Notes Summary

There are no Notes for this Case

Add Note or Attachment

Attempted Solutions

There are no attempted solutions for this Case

Related Action Summary

Personalize | Find | First 1-2 of 2 Last

Type	Summary	Status	Date Created	Added By
Solution	Go To Solution 301547 - Marriage Checklist		02/28/2013 9:56PM PST	Claudia Salinger
Solution	Go To Solution 301547 - Marriage Checklist		02/28/2013 9:56PM PST	Claudia Salinger

Human Resources

Job Data Information

Go

Benefits

Health Plans

Go

Payroll

Paycheck - US

Go

Training

Training Summary

Go

Save Case

Find Solutions

Escalate Case

Match Cases

Audit History

Created 02/28/2013 9:55PM PST

By HHDUSA_AGT1 Claudia Salinger

Modified 02/28/2013 9:56PM PST

By HHDUSA_AGT1 Claudia Salinger

Customer Information

In PeopleSoft Support cases, this group box displays information about the customer who reported the problem. In HelpDesk and HelpDesk for Human Resources cases, this group box displays employee

information. In Service Center for Higher Education, this group box displays a combination of these types of information, since such a case can be created for a company contact, consumer, or employee.

Select the **Show Details** link to see more information about the customer.

Note: The visibility of fields in this section depends on the Business Object Search setup, the display template that is used, and how you modify the display template.

These fields are used by PeopleSoft Support:

Field or Control	Description
Customer	Displays the customer (company or consumer) who reported the case.
Contact	Displays the contact person for this case. If the customer is a company, this is a person acting on the company's behalf. If the customer is a consumer, this is someone acting on the consumer's behalf. Note: The contact must have a currently active relationship with the company to be valid. If a consumer does not have a contact, this field is blank on the Case page. However, the search results grid on the Case Search page shows the consumer name in both the customer and contact columns.
Contact Method and Edit	Click Edit to enter the preferred method for contacting the caller.
Reported By	Select the person who is reporting the problem.
Site	Displays the customer site that is associated with the case. Initially, the system uses the contact's site (for this customer) as the default value. If this site doesn't exist or isn't unique, the system uses the customer's site (if unique) as the default value. The site is validated against the SIN and the Installed Product fields for the case. If you select a SIN or a product, the system enters the site that is associated with that SIN or product. If you select a site for which the current SIN or product is invalid, the system clears the SIN or product information.

Field or Control	Description
SIN (site identification number)	Displays the site identification number (SIN), which is generated for each valid site on an agreement line when the agreement line is created. The SIN identifies the agreement line, the site, and the customer, but not the contact. If you enter a SIN, you cannot also enter a PIN (personal identification number). When you select a SIN, the system enters the associated site in the Site field. If the product is not valid for the SIN, the system clears the Product field.
PIN (personal identification number)	Enter a PIN to identify a customer, a representative, and an agreement.
Region	Displays the region that is associated with the default address.
Customer Reference	Enter the reference number provided by the customer, if available. This number is used for the customer's internal tracking purposes.

Employee Information

Access the Employee Information section on the Case page in PeopleSoft HelpDesk for Human Resources.

In PeopleSoft HelpDesk cases, the **Employee Information** group box displays information about the employee who reported the problem.

If you enter information in this section to look up an employee for the case but the system cannot identify an exact match, a search page appears and you can select to create either worker or POI using the quick create function. If the search yields multiple matches, you can pick one from the search results or create a new one if deemed necessary.

Note: The visibility of the fields in this section is dependent on the display template that is used and how you modify the display template. If an agent has access to view secured data, the system displays information for the **Contact Method**, **Edit**, **Phone**, **Email**, **Address**, **Status**, and **Gender** fields. Secured worker information is home phone number, home email address, and home address. If the agent does not have access to view secured data, the system hides the data for these fields and the agent can only view data that is not secured.

These fields are used by PeopleSoft HelpDesk and HelpDesk for Human Resources:

Field or Control	Description
Employee	Displays the worker who is experiencing the problem. Click the name of the person to go to the Worker page, where you can change or add address, phone, and email details for the contact. Note: When you search for an employee, you can use the Employee ID, First Name, and Last Name as search fields. The Employee ID field uses the equals (=) operator. The other two fields use the Begins With operator. The operators are not displayed, so they aren't obvious to the user. You can, however, configure and change the default operator. See “Adding and Modifying BO Search and Quick Create Definitions” (Business Object Management).
National ID	Displays the ID number by which a person is identified nationally. In the U.S., it is the social security number. This field appears in PeopleSoft HelpDesk for Human Resources cases only.
Alternate Contact	Select an alternate contact for a case; for example, an office manager who handles calls for other employees.
Contact Method and Edit	Click Edit to enter the preferred method for contacting the caller.
Reported By	Select the person who is reporting the problem. In cases that are created for Higher Education, any individual may be selected for the Reported By field. In HelpDesk applications, existing agent-facing cases display the manager or employee who reported the problem and the employee name for whom the case was opened in the Employee field. In the case of the HR for HelpDesk application, you can also select POIs to report cases on behalf of employees. For example, a wife can log a case to ask about her husband's benefits plan coverage. If the search doesn't return the desired reported by person, you can create a new worker or POI on the search page using the quick create functionality.

Field or Control	Description
Department, Location, Address, and Employee Status	Displays information about the worker who is experiencing the problem. Note: In the HelpDesk for Human Resources application, the Department and Location fields are display-only. You cannot change the values that the system displays in these fields. In the HelpDesk application, which is customized for IT departments, you can edit the values in the Department and Location fields. The system provides values for the Department and Location fields by default based on the worker information, provided the setID specified for these fields in the worker component matches the setID specified for the appropriate record group for the Case business unit.
Gender	Displays the person's gender, if known. This field appears in PeopleSoft HelpDesk for Human Resources cases only.

Contact Method

Click the **Edit** link to edit a person's preferred method of contact. A secondary page appears.

Field or Control	Description
Contact Type	Select the address, email, or phone number that you want to use on the Case page. To enter additional contact information that is not in the system, use the drop-down list box. For example, suppose that you need to contact the caller at a hotel phone number. You can enter the phone number here and avoid adding the hotel phone number to the caller's permanent record.
Contact Details	Enter contact information for the contact.
Type	Displays the contact type for existing contact methods associated with this person. If adding a temporary new contact method, the field value defaults to <i>For This Case Only</i> .

Note that any emails initiated from a case by AAF will use the contact method associated with the recipient's role, regardless of whether the case has an email contact method with the type *For This Case Only*.

Academic Information Section

Access the Academic Information section on the Case page in PeopleSoft Service Center for Higher Education.

After identifying a constituent for a case in PeopleSoft Service Center for Higher Education, an agent will be able to view a display-only summary of the constituent's academic information.

Field or Control	Description
Institution	The academic institution associated with constituent.
Career	The academic career of the constituent.
Lifecycle Status	The program status (not including recruiting status) of the constituent. If the constituent is only a suspect or prospect, this field and the other fields below it will be blank.
Start Date	The start date for the specified combination of institution, career, program, and plan.
Program	The academic program associated with the constituent.
Plan	The plan within the specified program with which the constituent is associated.
Sub Plan	The sub plan within the specified program and plan with which the constituent is associated.

Main

Field or Control	Description
Global Case	Select this check box to identify the case as a Global Case.

Field or Control	Description
Quick Code	Select a quick code. Depending on your business rules, the quick code you select automatically populates other fields or suggests an action. If the quick code is associated with a display template ID, selecting that quick code will cause the case component to be shown using the associated display template ID. Note: Cases retain the display template ID with which they were originally created. Therefore subsequent views of the case will be shown using the original display template for that case, not the display template associated with the quick code.
Case Type	Select the case type that best describes the part of your organization that is responsible for the problem. For example, a case can be a documentation issue, a service request, or a possible product defect.
Case Subtype	Select the case subtype that best describes the kind of case type selected.
Case Status	Select the overall status of the case. Use the different statuses to track the progression of the case. You define specific statuses for your organization.
Provider Group	Select the provider group to which you want to assign the case. For new cases, the default provider group (if any) depends on your business unit configuration. When a Product Group is specified on a case, the system filters the values for product and installed product to only display the products and installed products contained within the specified product group. See Understanding Call Center Business Units and Understanding Display Templates.
	Click the Suggest a Provider Group button to generate a list of suggested provider groups on the Provider Group Summary page. Select one of the suggested provider groups.

Field or Control	Description
Assigned To	Select an agent who belongs to the selected provider group. For new cases, the default assignee depends on your business unit configuration. You cannot select an agent without first selecting a provider group. The only time that a case is assigned to an agent and not a provider group is when the default assignee is the agent who created the case. See “Understanding Assignment Searches” (Application Fundamentals).
	Click the Suggest an Agent button to generate a ranked list of qualified, available agents on the Candidate List page, where you can select one of the suggested agents. You must select a provider group before you can generate a candidate list.
Product Group	Select the product group that requires support. This field is enabled when you first install your PeopleSoft Support application. It is applicable for all the verticals except HelpDesk for Human Resources and Government.
Product	Select the product that requires support. Note: The system displays a list of products based on the option that you selected for the Product Prompt field on the Business Unit - Options page. If you selected <i>All</i>, you can select a product from the primary products table. If you selected <i>FSI</i> and you have FSI installed, you can select an FSI-related product from the primary FSI products table. If you selected <i>Installed</i>, you can select from a list of products that are installed at a specific site. When you select an installed product, the system enters the associated site in the Site field, and, if the current SIN is not valid for the product, clears the SIN field. To define a new installed product for this customer, click the Transfer button to access the Installed Products component.
Description	Enter a complete description of the problem that the caller is reporting. If you do not enter a description, the system copies the value of the Summary field into this field.

Field or Control	Description
Problem Type	Select an aspect of the product for which a call center agent might be qualified to resolve the problem. This field is related to the Product field. You must first select a product before the system displays problem type values that you can select. If the Product field is blank, no values are available. If you use the system's auto-assignment feature, the assignment engine employs the competencies associated with the problem type to help identify the agents who are most qualified to solve the problem.
Serial Number	Enter the serial number of the product that requires support or servicing. If you have selected a product, the system enters the serial number for that product. If you have not selected a product, selecting a serial number enters both the product and the serial number. If you enter a serial number directly into the Serial Number field when you first access the Case page for PeopleSoft Support and HelpDesk, the system automatically populates the Customer, Contact, Site, and Product fields on the Case page.
Asset Tag	Click to display the Search Installed Assets page, where you can look for installed assets by employee, department, and location. To display this field on the Case page, access the Display Template page to select the check box for the Asset Tag field.
Installed	If the product that you select is registered to the employee, consumer, or customer on the Installed Products page, it displays here (PeopleSoft Support and HelpDesk only).

Field or Control	Description
Select Agreement or Warranty	Click to search for warranties and agreement lines that might cover the case. This link is available only for open cases that are not already associated with existing agreements or warranties. Warranties are associated with installed products and are, therefore, found only in the PeopleSoft Support application and only if you've specified an installed product with a valid warranty. If the entitlement search returns more than one match, the system displays the results on the Entitlement Match page. From there, you can select a warranty or agreement line, view warranty or agreement line details, and associate a warranty or agreement line with the case. The system returns agreement lines as search results in entitlement searches for either a product or an installed product. The search attempts to locate either a product or an installed product on the agreement line that matches the product or installed product on the case. A warranty is returned in an entitlement search only if an installed product is supplied. If the entitlement search finds only one valid warranty or agreement line, the system bypasses the Entitlement Match page and displays the warranty or agreement line that was found on the case. Once you have selected an agreement line or warranty and saved the case, the system replaces this link with a link to access entitlement details of the selected agreement line or warranty, and a link to clear the current selection on the Case page. In addition, values of these fields are no longer available for edits: • (PeopleSoft Support) Customer, Contact, Business Unit, PIN, SIN, Site, Product Group, Product, Problem Type, and Serial Number. • (PeopleSoft IT HelpDesk) Employee, Business Unit, Product Group, Product, and Asset Tag. • (PeopleSoft HR HelpDesk) Employee and Business Unit. • (PeopleSoft Higher Education) Customer, Product Group, Product, and Business Unit.

Field or Control	Description
	Note: Once the page is saved, you can't modify an agreement line without special administrative-level permission. If you modify the entitlements of an agreement after the agreement is already selected on the case, the new entitlements don't take effect. The PeopleSoft system provides an Application Engine program (RF_AGR_LEAD) to verify the entitlements that are already scheduled at the time the agreement is selected. Select Customer Contracts CRM > Agreements > Lead Generation > Sales Lead Generation for Agreement Renewal.
Credit Authorization	This link initiates a search of the customer's billing records for a flag indicating whether to accept the customer's payment by credit card.
Priority	Select the priority that classifies the case according to its effect on the caller's ability to continue operations. A problem that stops mission-critical activities has a higher priority than a problem that has a workaround or that inconveniences someone.
Urgency	Select the urgency of the case. As delivered, this field is visible on HelpDesk (but not Support) cases, though this may be changed by your system administrator.
Severity	Select the severity of the case according to its reproducibility.
View Product Hierarchy	Click the View Product Hierarchy button to view the installed product records that meet the caller and product criteria already entered on the Case page. The system displays the parent, child, and sibling relationships for the selected installed product records on the Installed Product Viewable Hierarchy page. In PeopleSoft Support cases, the search is based on the customer, site, product, and serial number that have been entered. In PeopleSoft HelpDesk cases, the search is based on the worker, department, product, and asset tag that have been entered.

More

Field or Control	Description
View Mode	Use this field to manually change the display template that controls the appearance of the information that appears on the page. Note: This field is delivered as hidden. If you want it to appear on the page, you must select it on the Display Template - Page Definition page. When you change a display template (using AAF or manually) the system re-renders the entire page, including the toolbar, related actions, and various group boxes that appear on the pages within the Case component. The View Mode field displays all the display templates for the component, display template family, and selected business unit. The system obtains the list of display templates from the Call Center Definition - Display Templates page. When an agent changes the business unit on the Case page, the system repopulates the display template values that appear in the drop-down list box for the View Mode field. Warning! The display template that an agent selects using the View Mode field is temporary. This information is not stored in the Case record. Therefore, if an agent selects a display template that is not the default display template and then saves the case and comes back to it, the system displays the Case page with the default display template, not the one that the agent last used to view the case.
Business Unit	Displays the business unit that is associated with the case. Business units also control prompting for many other fields in the case. The system displays values that are valid for the business unit only. When you change the business unit, the values in this field are those for which the appropriate vertical (PeopleSoft Support or HelpDesk) is established. The system confirms that these conditions are met before the case is transferred to the business unit that you select: • The case has no related actions or related cases. • The current and new business units reference the same setup data (that is, they use the same setID) for these record groups: FS_18 (items), RB_01 (customers), RF_07 (agreements and warranties), and RC_02 through RC_09 (case attributes and AAF).

Field or Control	Description
Visibility	Select the visibility of the case. The options are <i>Internal</i>, <i>External</i>, and <i>Internal, exclude Case Contact</i>. Select the <i>Internal, exclude Case Contact</i> option to prevent self-service users from viewing the case through the self-service application.
Resolved by First Contact	Select to indicate that the agent resolved the case on the first contact with the customer or employee.
Source	Select the communication channel used by the person who originally reported the problem. For example, a person can report a case by telephone, email, or a self-service web page. A case can also be created as a result of a personal data record change in the HCM system.
Impact	Select from the drop-down list box a value that describes the effect that the problem has on the business processes of the organization.
Asset Tag	Select the asset tag of the installed product that requires support in PeopleSoft HelpDesk. If you entered a product, values are limited to asset tags for the specified product. If you have not entered a product, selecting an asset tag enters both the product and the asset tag.
Installed	Displays <i>Yes</i> or <i>No</i> in PeopleSoft Support and HelpDesk if the product that you select is registered to the employee, consumer, or customer on the Installed Products page.
Summary	Enter a summary of the problem that the caller is reporting. This field is required. If you do not enter a value, the system uses the first 80 characters of the Description field as the summary. This shortcut helps you avoid retyping the same text into two fields.

Field or Control	Description
Category, Specialty Type, and Details	Select category, specialty type, and details for the case. These are hierarchical fields. The category value that you enter limits the specialty type values, and the specialty type value that you enter limits the details values. Note: These fields can be set up to drive the case assignment process. See “Understanding the Configurable Toolbar” (Automation and Configuration Tools). See Combine Category/Type/Detail Page.

Additional Fields in the Case Information Section

Use the display template to control the visibility of these fields. You can choose whether these fields appear on the Main tab or the More tab.

Note: The system updates the response met and restore met dates and times for all cases, even if the case does not have an associated agreement with an entitlement.

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

Field or Control	Description
Secured Case	Select to indicate to the system that the case should only be viewed by individuals associated with the provider group on the case. When you mark a case as secured, you must enter a provider group before you can save the case. Once you secure the case, it is associated with the provider group. Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, that agent will not have access to the secured case.

Field or Control	Description
Anonymous Caller	Select if the caller wants to remain anonymous. No personal information is recorded, and no personal information is required to save the case. If the caller wants to register, clear the Anonymous check box and search for existing customers or use the Quick Create function to create a new customer. Note: The Anonymous Caller option requires that an anonymous customer or worker is already set up using the installation options. See “Creating Business Objects by Using the Quick Create Component” (Business Object Management).
Site without Customer	Select to enable cases to be created for specific sites without a customer. This check box is displayed after the Customer Information is selected. If you plan to use this option, first set up an anonymous customer, since the system assigns the anonymous customer when this option is selected.
Remote Case/Issue ID	The unique keys of the case in the third-party system from which the case was passed to PeopleSoft Call Center applications. This option is used to map the case created in CRM to its counterpart stored in a third-party system.
Purchased From	Enter the name of the vendor from whom the customer acquired the product or service that is referenced in the case.
Target Close Date	Enter the desired date of resolution for the problem.

Field or Control	Description
Error Code and Error Message	Error codes are relevant for business units that support products that can display error messages, products such as software or electronics. If you enable error code processing, users can access a list of frequently used solutions based on the error code or error message entered for the case. Enter any error code and error message that the caller reports. To fill in the message associated with the error code, click the Validate button. If the error code has not been used before, the system displays the Error Validation page. You can then use this page to search for or create new error codes and messages. By entering error information, you enable the Frequently Used Solutions page to list frequently used solutions according to the error. The system does not restrict you from prompting against known errors.
Response Met	Displays the date and time that the problem was fixed or the service was restored.
Restore Met	Displays the date and time the agent or service person restored service or fixed the problem with the product.
Entitled Response	Displays the date and time that the customer or employee is entitled to a response after they call in a problem.
Actual Response	Displays the date and time that the agent or service person actually responded to the caller's problem.
Entitled Restore	Displays the date and time that the caller is entitled to have their problem or service restored.
Red Restore and Yellow Restore	Displays the date and time that the problem or service will turn red or yellow if it is not restored. These fields are used in conjunction with agreements. To use these fields, you must enter a percent in the Percent of SLA for Red and Percent of SLA for Yellow fields on the Business Unit-Options page.
Actual Restore	Displays the date and time that the service or problem was actually fixed or restored.

Field or Control	Description
Survey Score	Displays the score generated by the survey that was sent to the customer. This field does not appear on the page unless you enable it using the Display Template - Page Definition page. You must also sign in as a user that has permission to view this field; otherwise it does not appear on the page. The Survey Score field uses the RC_VIEW_SURVEY_SCORE functional option code, the RC_VIEW_SURVEY_SCORE_GROUP functional option group code, and the Case Survey Score application security profile to enforce security. The PeopleSoft system delivers the functional option code for the Survey Score field on the Display Template - Page Definition page. It also delivers the Case Survey Score membership list, which is where you can control what roles or users are permitted to view the Survey Score once it is enabled on the Display Template - Page Definition page. For this membership list, the PeopleSoft system delivers the <i>Call Center Manager</i> and <i>Help Desk Manager</i> roles. Note: The Survey email is sent to Customer's primary email address. If the customer is a consumer, then the survey email is sent to the consumer's primary email address. If the customer is a company, then the survey email is sent to the contact's primary email address. On the Case page, an agent can edit the Contact Method field to enter an email with the <i>For This Case Only</i> type, which can be different from the customer's primary email. In that scenario, the survey email is still sent to customer's primary email address and not to the email address with the <i>For This Case Only</i> type. Using AAF policies, you can instruct the system to send out a survey when a case is in the Closed - Resolved status. In this type of policy setup, administrators can specify who to notify if an error occurs while sending out a survey. The two options are: Notify a Role and Notify a User. If the notify role option is selected and an error occurs, then all users having the specified role receive an email notification. If the user option is selected, then only that user will receive the email about the error. See “Understanding PeopleSoft CRM Security” (Application Fundamentals).
Escalation Date Time and Escalation Count	These fields display the date and time an escalation was initiated and the number of times the case was escalated. These fields are hidden when you first install your call center applications.

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

See [Understanding Assignment Options](#).

Enter information about the case in the following fields:

Actions

Access the Actions section on the Case page.

The Action Link Groups that you or your implementation team set up during installation appear in the **Related Actions** group box on the Case page. You can set up links in the **Related Actions** drop-down list box to create service orders and defects and to look for offers and promotions.

When the system loads the items in the **Related Actions** drop-down list box, it checks to see if the link definition is setID enabled. If it is, then the setID of the link definition is matched with the setID of the case, which is obtained from Case business unit. If the two setIDs do not match, then the system does not populate that link definition in the drop-down list box. When the Case page is loaded and the user changes the business unit, the system reloads the items in the **Actions** drop-down list box.

In PeopleSoft HelpDesk for Human Resources, you can link to pages in the PeopleSoft or E-Business HCM database (depending on which one your system is integrated with).

In PeopleSoft Service Center for Higher Education, you can link to pages in the PeopleSoft Campus Solutions application.

PeopleSoft Support, HelpDesk, and Service Center for Higher Education applications offer the capability to link to predefined actions from the Case page. You can execute actions on the Actions section of the Case Page, the Summary page, or the Related Actions page.

Note that in Service Center for Higher Education, some listed actions may not be applicable for all roles (constituent, company contact, or worker). If an action is attempted for someone who does not have a role that permits that action, an error message will be displayed to inform the user that the action is not available.

See [Managing Related Actions](#).

The PeopleSoft system delivers these predefined actions:

- *Asset Administrator*
- *Asset Summary*
- *Branch Script*
- *Business Project*
- *Case Survey*
- *Change Request - Create New*
- *Change Request - Relate*
- *Create RMA*
- *Defect - Create New*

- *Defect - Relate Existing*
- *Offer History*
- *Sales Lead*
- *Sales Order*
- *Service Order*
- *Remote Control*
- *Software Delivery*
- *Work Order - Create New*

Note: To create a related action to the Offer Presentation page in PeopleSoft Order Capture, you must set up the link using the Link Group pages. To display the **Get Offers or Promotions** icon, you must set it up using an AAF policy.

See [Understanding Link Setup](#).

See “Understanding AAF” (Automation and Configuration Tools).

Suggest Action

The system automatically displays a suggested action that the agent can perform. This suggestion is driven by policies that you set up in AAF.

See “Configure Call Center Suggested Action Page” (Automation and Configuration Tools).

Links

The system displays a category name (for example, *Human Resources*, *Benefits*, *Related Actions*) for specific links in a category and a **Go** button.

Depending on the security established for the links that are set up as content references (CREFs), an agent can view all links or a subset of the links. Note that only permission list security definitions from the content reference will be used for determining link visibility. If the user does not have access to any links in a category, the category does not appear.

Field or Control	Description
Go	Click this button after selecting a link in a category to access the corresponding component (specified as a link). When you click Go, the system: • Opens a new browser window with the target page (optional). • Enters the link's long description in the Related Actions section. Note: The PeopleSoft system includes links to Base Benefits and Benefits Administration enrollment functionality in PeopleSoft Capital Management (PeopleSoft HCM). Enrollment in medical and FSA (flexible spending accounts) plans under the COBRA (Consolidated Omnibus Budget Reconciliation Act) provisions is carried out in a different manner within PeopleSoft HCM. To access the enrollment pages for medical and FSA plans under COBRA, log on directly to your PeopleSoft HCM system.

See *PeopleSoft HCM: Application Fundamentals*.

See *PeopleSoft HCM: Benefits Administration*.

Related Links

[Case Creation](#)

[Understanding Call Center Prompt Tables](#)

[Validating Errors Reported by Callers](#)

“Understanding Installed Products” (PeopleSoft Product and Item Management)

“Understanding Business Project Tracking” (Automation and Configuration Tools)

[Understanding Link Setup](#)

[Setting Up Content References](#)

Escalating Cases

Access the Case page.

Use the **Escalate Case** button to send notifications to agents and managers. If you have associated an AAF trigger point with the button, the system displays a message when a user clicks the **Escalate Case** button.

Note: The PeopleSoft system does not deliver the **Escalate Case** button with any associated trigger points. You must use the functionality within AAF to activate this button before you implement your PeopleSoft call center applications.

When the user clicks **OK**, the system increments the escalation count, saves the escalation date and time, saves the case, and sets off one of these trigger points in AAF:

- When a Support Case is Escalated
- When a Help Desk Case is Escalated

See “Understanding AAF” (Automation and Configuration Tools).

Match Results Page

Use the Match Results page (RC_MATCH_RSLT_SEC) to view a list of matching cases based on the Case Match Definition.

Where appropriate, select a related case from the match results set. When selected, the case will appear in the Related Cases grid.

Navigation:

Click the **Match Cases** button on the Case, Solution, Summary, Notes, Tasks, Case History, Related Actions, Related Cases, or Interested Parties page.

This example illustrates the fields and controls on the Match Results page.

Match Cases

Match Results

Personalize | Find | View All | | First 1-2 of 2 Last

General

Employee

Details

	Score	Relationship Type	Case ID	Summary	Date Created	Global	Child Cases
☐		Global	220562	ESSP Enrollment open period	08/01/2012	☒	
☐		Global	220564	Is Palo Alto Medical group dropped	08/01/2012	☒	

OK

Cancel

The Match Cases page enables you to see any existing cases that match the current case. This lets you see if the current issue has already been recorded in another case. Any cases that match the current case will be displayed.

Field or Control	Description
Score	Displays a rating between 1 and 100 that represents how closely the entry matches the search criteria. This field is only displayed if keyword searching is enabled. Note: Keyword searching is enabled or disabled on the Match Detail page.
Relationship Type	Describes the type of relationship that will apply if you associate the case from this grid row with the current case.

Field or Control	Description
Case ID	Identifies cases which match the current case. Note: Case matching criteria are defined on the Match Detail page.
OK button	Click this button to associate the current case with the case on the selected grid row. The two cases will be associated with the relationship indicated on the selected grid row. Note that the system will also automatically make the following updates: • If the relationship type for the selected case has the Set Parent as Global Case check box selected, the system will automatically select and update the Global Case check box for that case. • If the relationship type for the selected case has the Set Status of Child Using Duplicate Case Status check box selected, the system will automatically update the status of the current case to the Duplicate Case Status defined on Business Unit Case Default page.

Note: If no existing cases meet the match criteria, the Match Results page will be displayed with a message indicating that no matches were found.

If case matching is not enabled for the business unit of the current case, the Match Results page will be displayed with a message indicating that no match criteria have been defined for this business unit.

See [Understanding Call Center Prompt Tables](#).

See [Defining Call Center Business Units](#).

Outbound Notification Page

Use the Outbound Notification page (RB_EM_OB_NOTIFY) to send a manual notification.

If you have purchased PeopleSoft ERMS, you can use the **Notification** button on the toolbar to compose new email messages using the Outbound Notification component or respond to existing email using Email Workspace.

The system automatically populates the contact and interested parties of the case in the recipient list on the Outbound Notification page.

Navigation:

Click the **Notification** button or **Set Reminder** button on the Case page or any page with the case toolbar.

The Outbound Notification page behaves slightly different if the **Set Reminder** toolbar button is clicked to access the page as opposed to the **Notification** button:

- The **Send** and **Send and Solve Case** toolbar buttons are unavailable.

- The system makes the sender of the notification the TO recipient of the notification.

See “Sending Manual Notifications From CRM Transactions” (Automation and Configuration Tools).

Installed Product Viewable Hierarchy Page

Use the Installed Product Viewable Hierarchy page (RF_INSTPROD_VH_SEC) to view the installed products that meet the criteria available on the Case page.

For the installed products that the system returns, the page displays parent, child, and sibling relationships to other installed products.

Navigation:

Click the **View Product Hierarchy** button on the Information section of the Case page.

For more information about viewing the installed product hierarchy, see “Understanding Installed Products” (PeopleSoft Product and Item Management).

Entitlement Match Page

Use the Entitlement Match page (RF_ENTL_LIST_SEC) to select from a list of warranties or agreement lines that may cover the case.

Navigation:

Click the **Select Agreement or Warranty** link on the Case page selecting an agreement or warranty agreement or warranty link

For more information about using entitlement matches, see “Understanding Entitlement Searches” (Application Fundamentals).

Entitlement Details Page

Use the Entitlement Details page (RF_VIEW_ENTL_SEC) to view the entitlements associated with a case.

This link is available after an agent selects an agreement line or a warranty.

Navigation:

Click the available warranty or agreement line link on the Case page.

For more information about using entitlement defaults, see “Understanding Agreements and Warranties” (Application Fundamentals).

Provider Group Summary Page

Use the Provider Group Summary page (RF_ASSIGN_PG_SEC) to select a provider group from the search result that can be assigned to the case.

Groups are ranked by their fit score, an evaluation of how well each group matched the case criteria.

Navigation:

Click the **Suggest a Provider Group** button on the Case page.

For more information about selecting provide groups, see “Understanding Assignment Searches” (Application Fundamentals).

Candidate Summary Page

Use the Candidate Summary page (RF_ASSIGN_LIST_SEC) to select a worker from the search result that can be assigned to the case.

Candidates are ranked by their fit score, an evaluation of how well each candidate matched the case criteria.

Navigation:

Click the **Suggest an Agent** button on the Case page.

For more information about selecting workers, see “Understanding Workers in CRM” (Business Object Management).

Validating Errors Reported by Callers

This topic provides an overview of error message validation and discusses how to validate an error.

The **Validate** button is delivered hidden. If you want to validate errors reported by callers, modify the display template to enable the links.

Page Used to Validate Errors

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Error Validation Page</u>	RC_CASE_ERROR	Search for existing errors or create new errors. Use this page when an error on a case does not have an unambiguous match in the error table. The error code elements are visible only if you have enabled the error code tracking for the business unit with which you are working.

Error Message Validation

When you support products such as software or electronics that provide users with diagnostic error messages, looking up frequently used solutions using the error message is an efficient way to resolve cases.

You record error information on the Case page. The system does not force you to select from known error messages. Instead, you can enter whatever error information the caller provides. The appearance of this

button is activated in the Display Template Details page. If it is activated in the display template, the button appears on the page. If it isn't activated in the display template, then the system does not display it.

When you enter an error code, the system goes through the following process to ensure that a corresponding entry appears in the Error table (ERROR_MESS_TBL):

1. The system checks whether the data that you entered is an unambiguous match for a single known error.

If a match is found, the system associates the case with the known error.

An unambiguous match is not necessarily an exact match. For example, if the case does not specify the error code but it has a message that is an exact match for a known message, then the system considers the match an unambiguous match. However, an error code alone is never sufficient for an unambiguous match because different products might use the same code for different purposes.

2. If no unambiguous match is established, you can click the **Validate** button to access the Error Validation page.

From this page, you can:

- Search for similar errors.

If you find and select an error, the system associates the case with that error. The search is a keyword search, so it does not require an exact match—a close match suffices. This search helps you find the error even if you don't type the full text of the error message or if you have typographical errors in your data.

- Create a new error record using the error code and error message that you entered on the Case page.

This process facilitates the process of adding error records to the database. Error records are established as the errors are reported, and you can avoid the initial work of creating records for all possible errors.

Error Validation Page

Use the Error Validation page (RC_CASE_ERROR) to search for existing errors or create new errors.

Use this page when an error on a case does not have an unambiguous match in the error table. The error code elements are visible only if you have enabled the error code tracking for the business unit with which you are working.

Navigation:

Click the **Validate** button within the **Case Information** group box on the Case page.

This example illustrates the fields and controls on the Error Validation page.

Case

Error Validation

07/21/2009 1:20:22PM PDT My Time Zone

[Save](#) | [Print](#) | [Spell Check](#) | [360 360-Degree View](#) | [360 360-Degree Search](#) | [Personalize](#)

Case ID New
Customer [MD Engineering](#)
Summary Router fails frequently
Open Cases 0

Status Open - New Case
Contact [Sujay Bandy](#)
Contact Method 800/222-7000(334)
Customer Value Gold ★★★★★

[Tasks \(0\)](#) [Case History](#) [Related Cases \(0\)](#) [Related Actions \(0\)](#) [Interested Parties \(0\)](#) [Case Error](#)

Case Error Information

Error Code
Error Message
[Search](#) [Create New Error](#) [Return to Case](#)

We are unable to find a match for the supplied Error. Please refine your search and try again, or create a new error.

Field or Control	Description
Error Code and Error Message	Displays the error code and error message that are prepopulated using the data from the Case page.
Search	Click to search for existing errors.
Create New Error	Click to create a new error record using the error code and message on the Error Validation page. If you changed the information on this page, the system updates the error code and message on the Case page to reflect the change. When you create a new error, the system associates the underlying case with the system-generated ID that is assigned to the error. The presence of an error ID on the case record indicates that the error has been validated.
Return to Case	Click to leave the page without validating the error. As long as the error remains unvalidated, the Validate button on the Case page remains available.

Integrating with Third-Party Asset Management Applications

PeopleSoft HelpDesk gives IT support personnel the ability to pass case information to a third-party asset management application in the performance of asset management tasks. Assets can be any network-connected device, such as a computer, peripheral, or router.

PeopleSoft HelpDesk provides the framework to launch the third-party application from the case toolbar and from the **Related Actions** sections. PeopleSoft HelpDesk has two toolbar buttons—one for Asset Discovery and one for Remote Control. These buttons launch a third-party asset management application

and pass information specific to the case to the third-party applications. The information from the case is passed in the URL. Case information that is passed is typically a person or asset ID, such as employee ID number or the asset tag.

The system captures the date and time when an agent launches the asset management application on the Related Actions page.

To set up case information transfer:

- Set up the link in the Link Definition page.
- Modify the content reference and point it at the Asset Management application installed at your site.

Understanding Employee Relations Case Management

Employee Relations refers to an organization's effort to maintain good employee relationship at workplace. PeopleSoft Employee Relations Case Management feature focuses on managing sensitive topics such as Accommodation Requests, Employee Health and safety, Conflict Resolution, Ethics & Conduct, among others. These issues are typically confidential in nature for both employees and the Organization in terms of accountability to Employee Privacy and their legal rights at the workplace.

PeopleSoft Employee Relations Case Management feature facilitates to:

- Adding multiple case assignees, both as Provider Group or Individual type
- Setting up Case access to assignees by roles
- Associating Case Access for each Assignee on a given Case ("who" can "see" what and "do" what on a given case)
- ER case creation for an anonymous reporter.
- Relating multiple ER Cases.
- Authorized agent to add notes/attachments.

Setting Up ER Case Access

This topic discusses how to configure case access definition based on roles.

Pages Used to Set Up ER Case Access

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Configure Case Access Page	RC_ER_ROLE_MAP	To set up a new mapping between display templates defined under ER family and ER user roles.

Configure Case Access Page

Use Configure Case Access page (RC_ER_ROLE_MAP) to set up mapping between display templates defined under ER family and ER user role. This mapping definition is used to filter the templates on ER Case page based on the role of selected assignee.

Navigation:

Setup CRM > Product Related > Call Center > Configure Case Access

This example illustrates the fields and controls on the Configure Case Access Page.

Field or Control	Description
Role Name	The role created for ER. The defined ER roles are: - ER HelpDesk Agent: Users with this role have Read/Write permission to access ER Case component. ER HelpDesk Agent will have read-write access to a case by default based on its role. However, such access can be overridden on a case by associating a different case access template to him. - ER HelpDesk Administrator: Users with this role has got Read/Write permission to access all ER Case components. - ER HelpDesk Manager: Users with this role has got Read/Write permission to access all ER Case components. - ER Case Panelist: Users with this role have Read/Write permission to access Case Notes page, whereas read-only access to any other RC_CASE component pages. The ER Case Panelist should have access to My Assigned Cases tile only.
Primary	Select to set the default Case Access, incase multiple display templates are added to the role. When someone is added as case assignee, then by default the primary case access template is associated to that person which defines the type of access he will have on that case. However, same can be overridden with another non-primary case access template that his underlying role has been mapped to.

Field or Control	Description
Display Template ID	Select the access template for the ER case. An administrator can add as many display templates with different configurations which they feel the users with such roles should be restricted with.
Case Access	Enter the access information based on the Case Access templates. This will be displayed in Case Access field in “Case Assignment and Access”.

Creating ER Cases

You can create ER cases that should only be viewed by members associated with the provider group on the case. Based on the granted case access, agents or provider group members can access the case within the specified time period.

Pages Used to Create ER Cases

Page Name	Definition Name	Usage
Create ER Case Tile	CR_RC_ERHD_CREATE (cref for the tile)	Used to access Employee Relations Case page in Add mode.
Employee Relations Case Page	RC_CASE	Used to create a new ER case.

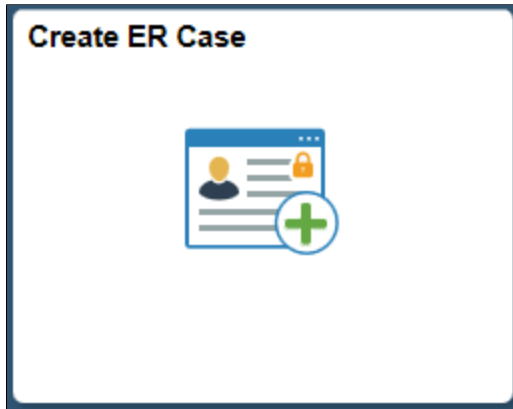
Create ER Case Tile

Use the Create ER Case tile to access Employee Relations Case page.

Navigation:

Select Fluid Home under the main menu. On the page that appears, select HR Service Agent. The Create Case ER tile is available on the HR Service Agent landing page.

Create ER Case tile



Click the Create ER Case tile to access Employee Relations Case page.

Employee Relations Case Page

Use the Employee Relations Case page (RC_CASE) to add and manage ER cases.

Navigation:

Click the Create ER Case tile on the HR Service Agent home page.

This example illustrates the fields and controls on the Employee Relations Case page.

Employee Relations Case

Save | Print View | Spell Check | 360-Degree View | 360-Degree Search | Notification | Text Tray | >> Personalize

Case ID New
Employee ID
Problem Summary

Case Status Open -New
Employee
Contact Method

Case Details | Notes (0)

Employee Information

Employee ID
First Name
Last Name

Search Advanced Search

Problem Information

*Problem Summary

Description

Case Information

Main | More

Quick Code
Case Type Accommodation
Case Subtype Medical
*Case Visibility Internal
*Case Status Open -New

Category ADA/FMLA
Specialty Type Need Accommodation
Detail Occupational
Case Priority High
Urgency High
Case Severity Many Affected

Case Assignment and Access ?

Assignment Summary Personalize | Find | First 1 of 1 Last

Primary	*Assignment Type	Provider Group	Assigned To	Start Date	End Date	Case Access	Comment
☒	Individual		Jennifer Michaels	07/04/2017		Agent: Read/Write All Pages	

Add new Assignee

Save Case Find Solutions Escalate Case

Audit History

Created	By
Modified	By

Save | Print View | Spell Check | 360-Degree View | 360-Degree Search | Notification | Text Tray | >> Top of Page

Employee Information

The Employee Information section displays information about the employee for whom the case is created.

Note: The visibility of fields in this section depends the display template that is used.

Field or Control	Description
Employee ID	Employee ID of the employee for whom the case is created.
First Name	First name of the employee.
Last Name	Last name of the employee.

Problem Information

You can enter the problem summary and description in this section.

The Summary field is required. The system can be configured so that values for the Summary and Description fields are automatically displayed on the Employee Relations Case page when the user selects a quick code. If a problem summary is already entered on an existing case, a quick code will not overwrite the Summary and Description fields unless the overwrite check box is selected for either the Summary or Description fields in the quick code. In this case, you can overwrite the values for the Summary and Description fields even if these fields are already populated.

Case Information

The Case Information section is used to enter ER Case specific information. For more details, see Case Page Activities.

Note: For ER cases, the case visibility is 'Internal'.

Case Assignment and Access

Use the Case Assignment and Access section to add single or multiple case assignee to work on the ER case. Case assignees can be provider group and its member, or it can be individual case assignee having access to ER cases.

Field or Control	Description
Primary	Select the check-box to add Primary Point of contact to the Case.
Assignment Type	Select the required assignment type. You can assign the case to Provider Group(s) and/or an Individual(s) having appropriate role based access to Case. In case of Group assignment, all members of the assigned Provider Group (s) will have authorized access to the Case whereas for Individual assignment, it's limited to only the individual assignee to the Case. Individual access will have precedence over Group Access for an assignee.
Provider Group	Select the required provider group. This field is enabled only when Group is selected in the Assignment Type field.
Assigned To	Select an assignee to work on the ER case. For group assignment this field can be used to identify a point of contact for the bug in the group.

Field or Control	Description
Start Date and End Date	You can select the period for which each case assignee has authorized access to the ER Case. The time period can be a subset of the entire Case life cycle. Start Date gets defaulted with the date on which Case assignee gets added, whereas End Date is optional to select. Selecting End Date marks the end to respective Case Assignee's access to the Case. Note: Primary assignee can't be end dated.
Case Access	Each Case Assignee's access is restricted by a Case Access Template which can be configured by means of Configure Case Access page. Each Case Access Template is pre-configured to have certain sections/pages/fields as visible/hidden and settings to render them. Different access privileges are determined based on the case access definition mapped against each case assignee. If the assignment type is individual, then the Case Access will be populated based on the assignee role defined in case access definition. If the assignment type is group then the configure case access prompt will be populated with all case access defined under configure case access setup for that particular display template family.
Comment	Click the icon to enter additional remarks about ER case assignment.
Add New Assignee	Click this button to add another assignee to the ER case.

Audit History

This section displays information about the agents who created and modified the ER Case details.

Using the PeopleSoft Fluid Interface to View and Manage ER Cases

This section discusses how to manage and view ER Cases.

Pages Used to View and Manage ER Cases

Page Name	Definition Name	Usage
<u>My ER Cases Tile</u>	CR_RC_ASG_CASE_ER_FL_GBL	Use My ER Cases tile to access My ER Cases page.
<u>My ER Cases Page</u>	RC_ASG_CASE_ER_FL	Use My ER Cases page to view a list of secured cases that are currently associated with the logged in agent.
<u>Search ER Cases Tile</u>	CR_RC_ERHD_SEARCH	Use Search ER Cases tile to access Employee Relations Case Search Page.
<u>Employee Relations Case Search Page</u>	RC_CASE_SEARCH	Use Employee Relations Case Search Page to search or add a case assignee.

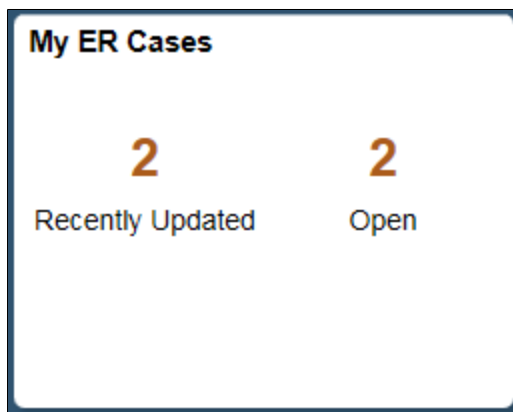
My ER Cases Tile

Use My ER Cases tile to access My ER Cases page.

Navigation:

Select Fluid Home under the main menu. On the page that appears, select HR Service Agent. The My ER Cases tile is available on the HR Service Agent landing page.

My ER Cases tile



The tile shows the total number of recently updated and open cases.

My ER Cases Page

Use My ER Cases page to access a list of ER cases assigned to logged in agent.

Navigation:

Click the My ER Cases tile available on the HR Service Agent home page.

This example illustrates the fields and controls on the My ER Cases page.

HR Service Agent My ER Cases

Jennifer Michaels
File Clerk

View: All my cases modified in last 7 days

Employee Relations Cases 2 rows

Case ID	Employee	Summary	Case Priority	Case Status	Provider Group	Assigned To	Last Modified
220885	Antonio Santos	down	High	Open - New		Jennifer Michaels	07/04/2017 12:24AM
220882	Robert Harrison	Accommodation	High	Open - New		Jennifer Michaels	07/03/2017 11:39PM

Field or Control	Description
View	Filter the cases that appear in the Employee Relations Cases list. Values are: - All my cases modified in last 7 days - All my open cases - All open cases as primary assignee - All open cases with my Provider Group as Primary Note: Latest updated case is displayed at the top of the page. You can also search for a case based on Case ID.
Case ID	Displays the unique ID of the case assigned to the agent.
Employee	Name of the employee for whom the case is created.
Summary	Brief case description.
Case Priority	Priority assigned to the case.

Field or Control	Description
Case Status	Status of the case. Different case statuses are: • Open – New • Closed – Cancelled • Cancelled – Duplicate • Closed – Duplicate • Closed – Resolved • On Hold • Open – Pending HR • Open – Reopened • Open – Research • Open – WC Claim • Open - Case Escalated • Open – Chg Request • Open – Pend Employee
Provider Group	The provider group to which the ER case was assigned. This field is left blank if case is assigned to an individual assignee.
Assigned To	The agent to whom the ER case was assigned. Note: If the case is assigned to multiple group or individual, then the Primary assignee is displayed.
Last Modified	The date and time on which the ER case was lastly modified.
Create Case button	Click this button to create a new ER case.

If you want to view the details of an ER case, click on the corresponding row. The Employee Relations Case page for the selected case is displayed. You can modify the ER case details as per requirement.

Search ER Cases Tile

Use Search ER Cases tile to access Employee Relations Case Search page.

Navigation:

Select Fluid Home under the main menu. On the page that appears, select HR Service Manager. The Search ER Case tile is available on the HR Service Agent landing page.

Search ER Case tile



Employee Relations Case Search Page

Use Employee Relations Case Search Page (RC_CASE_SEARCH_UPD) to search for existing cases or add a new case assignee to work on the case, if required.

Navigation:

Click the Search ER Case tile available on the HR Service Agent home page.

This example illustrates the fields and controls on the Employee Relations Case Search page.

Employee Relations Case

▼ Search Results

No results have been found or no search has been performed.

Add Case

▼ Search

Use Saved Search

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

*Business Unit

=

ER Helpdesk USA

Case

=

Employee ID

=

Employee

=

Reported By

=

Case Status

=

Assigned To

=

Urgency

=

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

Field or Control	Description
Add Case	Click this button to add new ER cases.

You can also search for existing cases.

Using the PeopleSoft Fluid User Interface to View and Manage HR HelpDesk Cases

This topic discusses how agents use the PeopleSoft Fluid User Interface to view and manage HR HelpDesk cases.

Pages Used to View and Manage HR HelpDesk Cases in the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>My HRHD Cases Tile</u>	CR_RC_ASG_CASE_HHD_FL_GBL	Access the My HRHD Cases page.
<u>My HRHD Cases Page</u>	RC_ASG_CASE_HHD_FL	View and manage your HRHD cases.

My HRHD Cases Tile

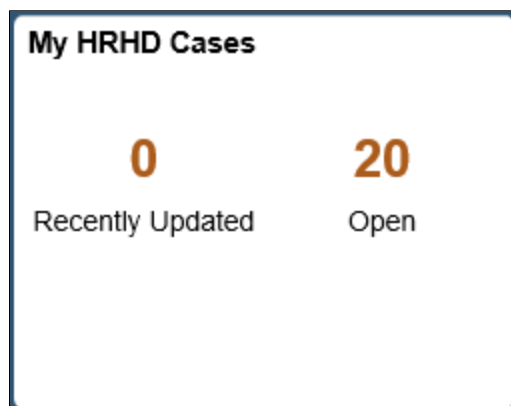
Use the My HRHD Cases tile (CR_RC_ASG_CASE_HHD_FL_GBL) to access the My HRHD Cases page. The tile shows the number of **Recently Updated** and **Open** cases.

Note: The Agent Triage Dashboard tile provides Agents access to an enhanced Agent Dashboard with the ability to group/triage HRHD cases thereby allowing them to easily manage cases.

Navigation:

You can add the My HRHD Cases tile, through personalization, to any system-delivered Agent homepage or a homepage that you create.

This example illustrates the fields and controls on the My HRHD Cases tile.



My HRHD Cases Page

Use the My HRHD Cases page (RC_ASG_CASE_HHD_FL) to view and manage your HRHD cases.

Navigation:

Click the My HRHD Cases tile on an Agent homepage.

This example illustrates the fields and controls on the My HRHD Cases page. You can find definitions for the fields and controls later on this page.

Case ID	Employee	Summary	Priority	Status	Provider Group	Last Modified
220880	Heidi Dubas	Where should I report issue in my paycheck?	Medium	Open - New	Benefits Administration	06/13/2017 11:47AM
220874	Rosanna Channing	Short term disability - not able to locate policy	Medium	Open - New	Benefits Administration	06/13/2017 11:40AM
220873	Vicki Zinn	Can I take family leave for my situation?	High	Open - New	Benefits Administration	06/13/2017 5:40AM
220872	Vicki Zinn	Family leave not showing in the list	High	Open - New	Benefits Administration	06/12/2017 6:44AM
220871	Vicki Zinn	Family leave policy?	High	Open - New	Benefits Administration	06/12/2017 6:43AM
220868	Vicki Zinn	When can I avail family leave?	High	Open - New	Benefits Administration	06/13/2017 5:32AM
220867	Rosanna Channing	Policy document for family leave	Medium	Open - New	Benefits Administration	06/13/2017 11:39AM
220866	Russell Parker	How to view change in compensation?	Medium	Open - New	General Inquiries	06/12/2017 6:33AM
220865	Russell Parker	Policy document for marriage	Medium	Open - New	Life Events Administration	06/12/2017 6:31AM
220863	Edmund Donahue	Flexible benefits have reduced after annual increment	Medium	Open - New	Benefits Administration	06/05/2017 5:08AM
220862	Edmund Donahue	Policy document for family leave	Medium	Open - New	Benefits Administration	06/05/2017 5:08AM
220861	Edmund Donahue	Why am I not able to avail family leave	Low	Open - New	Benefits Administration	06/05/2017 5:07AM
220860	Edmund Donahue	How to view change in compensation?	Low	Open - New	General Inquiries	06/05/2017 4:56AM

Field or Control	Description
View	Filter the cases that appear in the HR HelpDesk Cases list. Available values are: - All my cases modified in last 30 days - All my cases modified in last 7 days - All my open cases - Unassigned cases in my provider group Note: The last updated case is always displayed at the top of the page.
Enter Case ID to Search for a Case	Enter a Case ID to navigate directly to the case page.
Case ID	Displays the unique ID of the case.
Employee	Name of the employee for whom the case is created.
Summary	Displays a brief case description.

<i>Field or Control</i>	<i>Description</i>
Priority	Displays the priority assigned to the case.
Case Status	Displays the status of the case.
Provider Group	The provider group to which the HRHD case is assigned. This field is left blank if the case is assigned to an individual.
Assigned To	The agent to whom the HRHD case is assigned. Note: If the case is assigned to multiple group or individual, then the Primary assignee is displayed.
Last Modified	The date and time when the HRHD case was last modified.
Create Case button	Click this button to create a new case.

Setting Up of the Info Tiles for the Fluid Agent Triage Dashboard as an Administrator

This topic discusses how administrators set up the Info Tiles for the Fluid Agent Triage Dashboard.

Pages Used to Set Up the Info Tiles for the Fluid Agent Triage Dashboard as an Administrator

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Configure Search Definitions Page	RC_ADMFLTR_PREF_FL	Set search definitions to appear as Info Tiles on the Agent Triage Dashboard.
Configure Search Page	RC_AGT_TRIAGE_FL	Configure the search fields for the search definitions.

Configure Search Definitions Page

Administrators use the Configure Search Definitions page (RC_ADMFLTR_PREF_FL) to set search definitions to appear as Info Tiles on the Agent Triage Dashboard.

Navigation:

Set Up CRM > Product Related > Call Center > Configure Search Definitions

This example illustrates the fields and controls on the Configure Search Definitions page.

The screenshot shows the 'Configure Search Definitions' page. At the top, there's a header with 'HR Service Administrator' and 'Search Definitions'. Below the header, there's a 'Configure Search Definitions' section with a 'Save' button. A table lists search definitions. The first row is 'Sev1 Cases' with condition 'Open cases with Severity 1', last update '10/26/2018 3:50:55AM', and 'Share with Agent' set to 'Yes'. Below the table is a 'Search Definition Settings' section with a toggle for 'Allow Agents to Create Search Definition' set to 'Yes'.

Search Name	Search Condition	Last Update Date/Time	Share with Agent	Configure
Sev1 Cases	Open cases with Severity 1	10/26/2018 3:50:55AM	Yes	

Search Definition Settings

Allow Agents to Create Search Definition ☒ Yes

Field or Control	Description
	Click the button to add a new search definition.
Share with Agent	Administrators can swipe the slider to Yes to share their search definitions with Agents.
Configure	Click the Configure button to edit the search definition.
Search Definition Settings: Allow Agents to Create Search Definition	Administrators can swipe the slider to Yes to allow Agents to create their own search definitions.
Save	Click the Save button to save your settings.

Configure Search Page

Administrators use the Configure Search page (RC_AGT_TRIAGE_FL) to configure the search fields for the search definitions.

Note: The search fields appearing on the Configure Search page are controlled by the Configurable Search Setup. For details, see the Configurable Search Setup section below.

Navigation:

On the Configure Search Definitions page, click the Plus (+) button or the **Configure** button to access the Configure Search page.

This example illustrates the fields and controls on the Configure Search page.

Cancel

Configure Search

Save

* Search Name

Sev1 Cases

Search Description

Open cases with Severity

▼ Search

Business Unit

=

▼

HR HelpDesk Dashboard

▼

Case Status

=

▼

Open - New

▼

Case Priority

=

▼

High

▼

Urgency

=

▼

▼

Case Severity

=

▼

Many Affected

▼

Source

=

▼

▼

Created in Days

<=

▼

7

Updated in Days

=

▼

Category

=

▼

▼

Specialty Type

=

▼

▼

Detail

=

▼

▼

Provider Group

=

▼

Q

Assigned To

=

▼

Q

Date Created

=

▼

Date Closed

=

▼

Global

=

▼

▼

Escalation Flag

=

▼

▼

Department

=

▼

Q

Location Code

=

▼

Q

Delete

Field or Control	Description
Delete	Use the Delete button to delete an existing search definition. Note: The Delete button appears on this page only when accessed via the Configure button.

Configurable Search Setup

The Configurable Search Setup controls the search fields appearing on the Configure Search page.

Navigation:

Set Up CRM > Common Definitions > Component Configuration > Configurable Search Setup

This example illustrates the fields and controls on the Configurable Search Setup.

Search Definitions

Configurable Search Setup

Search Options

Advanced Options

Search Fields

Component

RC_AGT_TRIAGE_FL

Market

Global

Page

RC_AGT_TRIAGE_FL

Record

RC_AGT_TRIAGE_V

Description

Agent Case Triage

User Personalizations

☒ Allow User Personalization?

☒ Allow user to save search criteria?
 ☒ Allow user to personalize available search fields?
 ☒ Allow the user to choose how the Results Grid is Initialized

Results Grid Initialization

☐ Populate the grid automatically, apply the most recently used criteria
 ☐ Populate the grid automatically, apply the user's default saved search
 ☒ Do not populate the grid

Search Button Position

☐ Top
 ☒ Bottom
 ☐ Both Top and Bottom

Collapse the Search Section?

☐ Show Collapsed When Page Opens
 ☐ Collapse After Doing a Search

Advanced / Basic Lookup

Lookup Type

Advanced Lookup Only

▼

Related Links

“Configuring Searches” (Automation and Configuration Tools)

Using the Fluid Agent Triage Dashboard to View and Manage HR HelpDesk Cases

This topic discusses how agents use the Fluid Agent Triage Dashboard to view and manage HR HelpDesk cases.

Understanding the Fluid Agent Triage Dashboard

The Fluid Agent Triage Dashboard helps HR HelpDesk agents to:

- Create Search definitions to be displayed as Info Tiles on their dashboards.
- Group or triage cases into various categories to effectively manage all cases.
- Search for cases using Case IDs.
- Create new cases.
- Activate or inactivate the search definitions on their dashboard.

Pages Used to View and Manage HR HelpDesk Cases Using the Fluid Agent Triage Dashboard

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Agent Triage Dashboard Tile</u>	CR_RC_AGT_TRIAGE_GBL_FL	Access the Agent Triage Dashboard page.
<u>Agent Triage Dashboard Page</u>	RC_AGT_DASHBRD_FL	View and manage/triage the HR HelpDesk cases.
<u>Personalize Search Definitions Page</u>	RC_AGTFLTR_PREF_FL	Agents use this page to configure the search definitions and the order of display of the Info Tiles on the Agent Triage Dashboard.
<u>Configure Search Page</u>	RC_AGT_TRIAGE_FL	Agents use this page to set their own search definitions to appear as Info Tiles on the Agent Triage Dashboard.

Agent Triage Dashboard Tile

Use the Agent Triage Dashboard tile (CR_RC_AGT_TRIAGE_GBL_FL) to access the Agent Triage Dashboard.

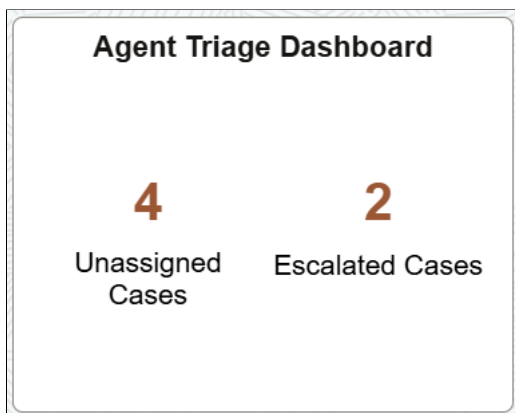
Note: The Agent Triage Dashboard tile is a dynamic tile created using the Tile Wizard. You can find the setup details in **PeopleTools** > **Portal** > **Tile Wizard**, under the Tile Name: AGENT_TRIAGE_DASH.

For more information, refer the topic *Using Tile Wizard on PeopleTools: Portal Technology*.

Navigation:

You can add the My Agent Triage Dashboard tile, through personalization, to any system-delivered Agent homepage or a homepage that you create.

This example illustrates the fields and controls on the My Agent Triage Dashboard tile.



The Agent Triage Dashboard tile displays the number of cases for the top two search definitions, in the order of display as set in the [Personalize Search Definitions Page](#).

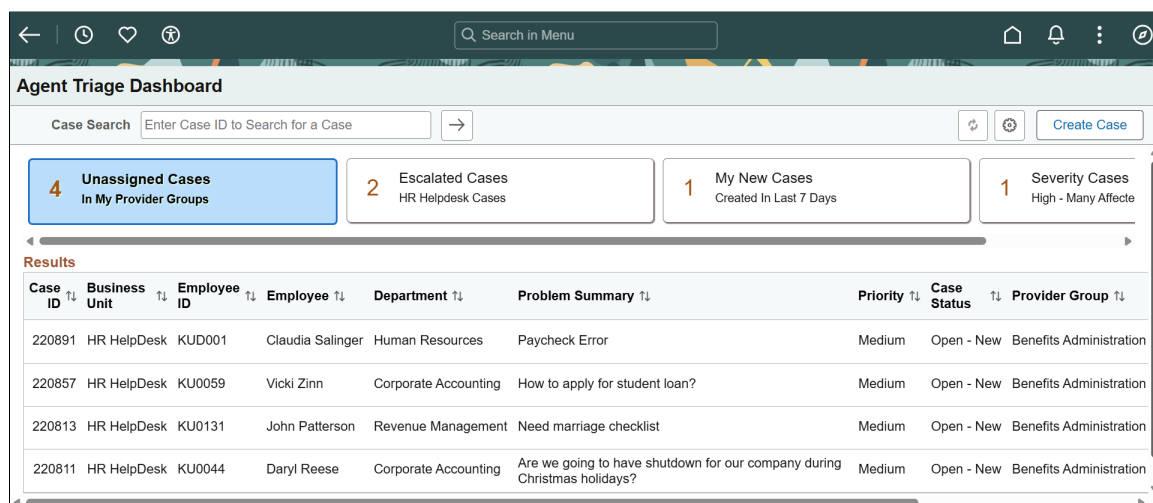
Agent Triage Dashboard Page

Use the Agent Triage Dashboard page (RC_AGT_DASHBRD_FL) to view and manage/triage the HR HelpDesk cases.

Navigation:

Click the My Agent Triage Dashboard tile on an Agent homepage.

This example illustrates the fields and controls on the Agent Triage Dashboard page. You can find definitions for the fields and controls later on this page.



Field or Control	Description
Case Search	Enter a Case ID to navigate directly to the case page.
	Click the Refresh button to refresh the page.
 Configuration Update button	Click to access the Personalize Search Definitions page, where as an Agent you can set search definitions to appear as Info Tiles on the Agent Triage Dashboard.
Create Case	Click this button to create a new case.
Info Tiles	Info Tiles are Search Categories created either by an Agent or the Administrator. A maximum of eight Info Tiles are displayed at the top of an Agent Triage Dashboard. The order in which these appear can be set in the Personalize Search Definitions page.
Case ID	Displays the unique ID of the case.
Business Unit	Displays the business unit.
Employee ID	Displays the ID of the employee for whom the case is created.
Employee	Name of the employee for whom the case is created.
Department	Displays the department.

<i>Field or Control</i>	<i>Description</i>
Problem Summary	Displays a brief case description.
Priority	Displays the priority assigned to the case.
Case Status	Displays the status of the case.
Provider Group	The provider group to which the HRHD case is assigned. This field is left blank if the case is assigned to an individual.
Last Modified	The date and time when the HRHD case was last modified.
Quick Update	Click this button to Quick Update page where you can update the case information as well as add a note.

This example illustrates the fields and controls on the Quick Update page.

		Quick Update		Save
Business Unit HRH DU		Phone 925.694.7959		
Days Open 1567		Last Modified 05/11/2017 10:22PM		
▼ Case Information				
Summary	How to apply for student loan?			
Description	How to apply for student loan?			
Status	Open - New			
Priority	Medium			
Severity	One Affected			
Secure	☐ No			
Global	☐ No			
Category	Employee Management			
Type	Personal Information			
Detail				
Source	HCM HR HelpDesk			
Provider Group	Benefits Administration			
Assigned To				
▼ Add a Note				
Subject				
Details	 			
Visibility	Internal			
Note Type				

<i>Field or Control</i>	<i>Description</i>
 Chevron button	Click the Chevron button on a case row to navigate directly to that case.

Personalize Search Definitions Page

Agents use the Personalize Search Definitions page (RC_AGTFLTR_PREF_FL) to configure the search definitions and the order of display of the Info Tiles on the Agent Triage Dashboard.

Navigation:

Click the Agent Triage Dashboard tile on an Agent homepage. On the Agent Triage Dashboard page, click the Configuration Update button to open the Personalize Search Definitions page.

This example illustrates the fields and controls on the Personalize Search Definitions page.

Order	Search Name	Search Condition	Display	Configure
1	Escalations	Escalations - immediate action	Active	
2	Open - High	New open cases with high priority	Active	
3	Sev1 Cases	Open cases with Severity 1	Active	
4	Research	Cases requiring research	Active	
5	Change Request	Change request from customers	Active	

Save

Configure Search Page

Agents use the Configure Search page (RC_AGT_TRIAGE_FL) to set their own search definitions to appear as Info Tiles on the Agent Triage Dashboard.

Navigation:

Click the Agent Triage Dashboard tile on an Agent homepage. On the Agent Triage Dashboard page, click the Configuration Update button to open the Personalize Search Definitions page and then click the Configure button or Plus button.

This example illustrates the fields and controls on the Configure Search page.

Cancel

Configure Search

Save

*Search Name

Sev1 Cases

Search Description

Open cases with Severity

▼ Search

Business Unit

=

▼

HR HelpDesk Dashboard

▼

Case Status

=

▼

Open - New

▼

Case Priority

=

▼

High

▼

Urgency

=

▼

▼

Case Severity

=

▼

Many Affected

▼

Source

=

▼

▼

Created in Days

<=

▼

7

Updated in Days

=

▼

Category

=

▼

▼

Specialty Type

=

▼

▼

Detail

=

▼

▼

Provider Group

=

▼

Q

Assigned To

=

▼

Q

Date Created

=

▼

Date Closed

=

▼

Global

=

▼

▼

Escalation Flag

=

▼

▼

Department

=

▼

Q

Location Code

=

▼

Q

Delete

Field or Control	Description
Delete button	Use the Delete button to delete the search definition.

Creating Cases Automatically For HCM Updates

Understanding Automatic Case Creation For HCM Updates

This topic discusses the following:

- Case creation for HCM self-service transaction updates.
- Active Analytics Framework setup for automatic case creation.
- Quick codes and EIP information.
- Create Case EIP.

Creating Case for HCM Self-Service Transaction Updates

PeopleSoft CRM HelpDesk for Human Resources provides the ability to automatically create cases for personal and job data updates that are made through transactions in HCM.

For example, an employee signs into the self-service application and submits a name change request after getting married. Submission of this request triggers the system to evaluate if the update warrants the creation of an HR HelpDesk case and if the answer is yes, a message is sent to the integrated CRM system, and subsequently, CRM system creates a HR HelpDesk case for the name change. The case then gets assigned, worked on and resolved, based on how the existing case management process is defined.

Note: Automatic case creation is not applicable for updates made for Persons of interest (POIs). That is, when you submit a name change or job relocation request through self-service transactions for a POI, it will not automatically create an HR HelpDesk case.

Active Analytics Framework (AAF) Setup for Automatic Case Creation

The automatic case creation feature leverages AAF setup components to build policies that specify the conditions (the types of HCM data updates) for which the system needs to create HR HelpDesk cases automatically. The system delivers trigger points, policies, actions, and other setup components for use in this feature.

When an employee updates their personal data or job data in HCM at runtime, AAF invokes the corresponding trigger point and evaluates the policy that is associated with the trigger point. If all conditions of the policy are evaluated to true based on the runtime scenario, it executes the Create Case action of the policy.

The Create Case action publishes information that is needed to create the case from HCM to CRM through an Enterprise Integration Point (EIP). When CRM receives the message, it takes the information

from the message and uses the agent-facing RC_CASE_CI component interface to create the HR HelpDesk case for the data update in HCM.

Note: PeopleSoft delivers the Active Analytics Framework, trigger points and policies as disabled; make sure you enable them to use the AAF setup.

AAF Component	Delivered Value
Trigger Point	The following trigger points invoked from the component PostSaveChange event: • After the Person Data is Updated. • After the Job Data is Updated.
Policy	Following policies available for the <i>SHARE</i> setID. • Name is Changed: Condition: If first or last name is changed, and regulatory region is USA. • HRHD: Job Location is changed Condition: If location is changed, and the business unit is <i>Global Business Institute BU</i>, and HR status is <i>Active</i>. • HRHD: Early Retirement Requested Condition: If action is <i>Retirement</i>, and reason is <i>Early Retirement</i>, and HR status is <i>Active</i>. Note: The policies mentioned here are examples of the system-delivered policies. You can modify the existing policies, or create new ones as per your requirements.
Action	Create Case in CRM This action sends the information collected on the action configuration page in AAF to CRM in the form of EIP messages. See Create Case EIP.
Term	Several terms are available in the following subject areas: • Job data • Person data Note: You can create new terms as per your requirements.

Quick Codes and EIP Information for Automatic Case Creation

To build an AAF policy in HCM, the administrators need to refer to the CRM quick codes. To ensure that the quick codes are present in HCM, we need to publish the quick codes from CRM and this is done using EIPs. The EIP publishes the following quick code field values:

- Business Unit
- Quick Code
- Effective Date
- Status as of Effective Date
- Description (quick code)
- Summary
- Case Status
- Overwrite
- Problem Description

For publishing quick codes from CRM to HCM as part of automatic case creation, CRM uses two asynchronous one-way EIPs:

- `HD_QUICK_CODE_FULLSYNC`: You need to invoke the publish process in the Full Data Publish utility of Enterprise Components for initial full synchronization.
- `HD_QUICK_CODE_SYNC`: Publishes the incremental synchronization when a quick code is added or modified.

Ideally, during the initial setup, you need to use the full synchronization EIP(`HD_QUICK_CODE_FULLSYNC`) to export all CRM quick codes to the HCM system. Once you export all quick codes, turn off this EIP. Later on, whenever you want to export the newly created or modified quick codes, use the incremental synchronization EIP(`HD_QUICK_CODE_SYNC`). If you think the codes are corrupted in HCM, you need to run the quick code full synchronization, as the EIP removes all existing quick codes from HCM and reloads it from CRM.

Note: Subsequent quick code changes while you synchronize to HCM do not get reflected in the existing AAF policies in HCM. However, while processing the Create Case EIP messages in CRM, the system will always use the latest version of quick codes.

For more information on how to publish the quick codes from CRM to HCM, see [Publishing quick codes from CRM to HCM](#)

Create Case EIP

When the Create Case action is invoked in AAF, it publishes a one-way, asynchronous EIP (`HD_HRHD_CASE`) message from HCM to CRM. The message contains information that CRM uses to create HR HelpDesk cases and pre-populate them with default values using the agent facing component interface (`RC_CASE_CI`).

The case-related information includes:

- Employee ID (for whom the case is created)
- Employee Referral ID (by whom the case is created)
- Business Unit
- Quick Code
- Problem Description

For each Create Case EIP message it receives, CRM uses the business unit and the quick code from the message to derive the rest of the default values that need to be populated to a case.

Case Problem Description

The CRM system obtains default values for case problem description from two sources: the quick code definition and the EIP message (which originates from the AAF action). It then evaluates the following conditions and decide which one to use for a case:

- If the Overwrite option of the (problem) Description field is enabled in the associated quick code definition, system uses the quick code problem description. If the Overwrite option is disabled, the problem description from the EIP message is used instead.
- If problem descriptions from both sources (quick code and EIP message) are unavailable, the problem summary text from the quick code definition is used as the problem description of the case.
- If problem summary is unavailable from the quick code definition, the first 80 characters of the problem description is used as the problem summary of the case.

Case Visibility

By default, the visibility of cases created for HCM data update is set to *Internal*.

Case Source

The CRM system populates the **Source HCM** field value as the default source of cases created for the HCM data update.

Setting Up Automatic Case Creation

We deliver the CRM system with the automatic case creation facility disabled. To enable the automatic creation of cases in CRM when a person updates his or her personal or job data in HCM, follow the steps below:

1. Configure the default HCM source value that you should populate in the cases.
2. Set up the Integration Broker to execute the Create Case and Quick Code EIPs.
3. Publish the quick codes from CRM to HCM using EIPs for an initial full synchronization.
4. Enable the *Enable Runtime* option on the Install Options page of the AAF setup in the HCM system.

5. Configure AAF policies that decide when you need to initiate automatic case creation.

Configuring the Default HCM Source Value

Use the Case Defaults page to configure a default case source for the business unit for which you want to enable the automatic case creation.

For example, if you are enabling automatic case creation for the business unit *HRH DU*, edit the record for HRH DU business unit to set the value of **Source HCM** field to HCM HR HelpDesk

Navigation:

Set up CRM > Business Unit Related > Call Center Definition > Case Defaults

This example illustrates the fields and controls on the Case Defaults page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Case Defaults' configuration page. At the top, there are tabs for 'Call Center BU', 'Options', 'Display Templates', and 'Case Defaults'. Below the tabs, the 'Business Unit' is set to 'HRH DU' and 'HR HelpDesk'. The 'Case Defaults' section includes a 'Find | View All' link and a pagination indicator 'First 1 of 4 Last'. Below this, there are two input fields: '*Template Family' with the value 'CRM_HHD' and '*Component Name' with the value 'RC_CASE'. Below these fields is a section titled 'All Call Centers' which contains a list of fields with dropdown menus: 'New Case Status' (Open - New), 'Resolved Case Status' (Closed-Resolved), 'Reopened Case Status' (Open - Reopened), 'Duplicate Case Status' (Canceled - Duplicate), 'Case Type' (Question/Problem), 'Case Subtype' (Advanced), 'Case Priority' (Medium), 'Case Impact', 'Urgency', 'Case Severity' (Many Affected), 'Source' (Direct Call), 'Source Web Service' (3rd Party), 'Source ERMS' (eMail), 'Source HCM' (HCM HR HelpDesk), and 'Product Group'.

Setting Up Integration Broker

Follow the steps below to set up the Integration Broker for automatic case creation:

1. Edit the *CASE_EIP* queue to set the **Queue Status** to *Run* in both HCM and CRM systems.
2. Check if the **Domain Status** is set to *Active* in HCM and CRM systems.

3. In HCM, check the following settings against the remote node *PS CRM - Local Node*:
 - If PSFT_CR is not the PS CRM local node in the system, rename the PSFT_CR node to match the name of the existing CRM local node.
 - In the **Authentication Option** field, select *Password*. Also ensure that the node password is the same as the one used in the local node. E.g.: PSOFT.
 - In the **Default User ID** field, select the HRHD Administrator role.
4. In HCM, check the following settings against the local node in the system:
 - In the **Authentication Option** field, select *Password*.
 - Make sure that the node password is the same as the one used in the remote node. E.g.: PSOFT.
5. In HCM, add the remote node (the CRM node) to the LOCAL gateway and make sure that you are able to ping the node successfully. Repeat this step in CRM to add the remote node (the HCM node) to the LOCAL gateway, and ping the node.
6. In CRM, check the following settings against the remote node *PS HRMS - Local Node*:
 - If PSFT_HR is not the PS HRMS local node in the system, rename the PSFT_HR node to match the name of the existing HCM local node.
 - In the **Authentication Option** field, select *Password*. Also ensure that the node password is the same as the one used in the local node. E.g.: PSOFT.
 - In the **Default User ID** field, select the HRHD Self Service role.
7. In CRM, check the following settings against the local node in the system:
 - In the **Authentication Option** field, select *Password*.
 - Make sure that the node password is the same as the one used in the remote node. E.g.: PSOFT.

Note: To read more about the Integration Broker setup, see the product documentation for *PeopleTools: Integration Broker* and *PeopleTools: Integration Broker Administration*.

Publishing quick codes from CRM to HCM

To publish quick codes from CRM to HCM for automatic case creation, system uses two asynchronous one-way EIPs:

- **HD_QUICK_CODE_FULLSYNC**: You need to Invoke the publish process in the Full Data Publish utility of Enterprise Components for initial full synchronization.
- **HD_QUICK_CODE_SYNC**: The incremental synchronization is published automatically when a Quick Code is added or modified.

Ideally, during the initial setup, you need to use the full synchronization EIP(**HD_QUICK_CODE_FULLSYNC**) to export all CRM quick codes to the HCM system. Once you

export all quick codes, turn off this EIP. Later on, whenever you want to export the newly created or modified quick codes, use the incremental synchronization EIP(HD_QUICK_CODE_SYN). If you think the codes are corrupted in HCM, you need to run the quick code full synchronization, as the EIP removes all existing quick codes from HCM and reloads it from CRM.

Initial Full Synchronization

Follow the procedure below to publish the quick codes from CRM to HCM:

1. Log on to CRM as an administrator user.
2. Access the Full Data Publish Rules page and edit the full data publish rule configured for the *HD_QUICK_CODE_FULLSYNC* service operation and make the changes listed below:
 - Enter *HD_QUICK_CODE_FULLSYNC* in the **Publish Rule ID** and **Description** fields.
 - Select *Active* in the **Status** field.
 - Clear the **Create Message Reader** and **Create Message Trailer** check boxes.

Navigation: Enterprise Components, Integration Definitions, Full Data Publish Rules

This example illustrates the Full data publish rules configuration for automatic case creation.

The screenshot shows the 'Full Table Publish Rules' configuration page. The 'Service Operation' is 'HD_QUICK_CODE_FULLSYNC'. The 'Operation Description' is 'Quick Code Full Sync'. The 'Message.Version' is 'HD_QUICK_CODE_FULLSYNC'. The 'Publish Rule Definition' section includes fields for 'Publish Rule ID' (HD_QUICK_CODE_FULLSYNC), 'Description' (HD_QUICK_CODE_FULLSYNC), and 'Status' (Active). There are also fields for 'Chunking Rule ID' and 'Chunk Table'. The 'Message Options' section has checkboxes for 'Create Message Header' and 'Create Message Trailer', both of which are unchecked. The 'Output Format' section has radio buttons for 'Message' (selected), 'Flat File', and 'Flat File with Control Record'.

3. Click the Languages tab of the Full Data Publish Rules page and select the following check boxes:
 - Publish All Related Languages
 - Publish Base Language

This example illustrates the Full data publish rules - Languages configuration for automatic case creation.

The screenshot displays the 'Full Table Publish Rules' configuration interface. The 'Languages' tab is selected. The table shows a single entry for 'HD_QUICK_CODE_FULLSYNC' with the description 'Quick Code Full Sync'. Below the table, the 'Publish Rule Definition' section is visible, showing the rule ID and description as 'HD_QUICK_CODE_FULLSYNC'. At the bottom, the checkboxes for 'Publish All Related Languages' and 'Publish Base Language' are both checked.

4. Access the Full Data Publish page and add a new run control for the HD_QUICK_CODE_FULLSYNC service operation.

- Enter an identifier in the **Request ID** field.
- Select *Once* in the **Process Frequency** check box.
- Search and select *HD_QUICK_CODE_FULLSYNC* in the **Service Operation** field.

Navigation: Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish

This example illustrates the Full Data Publish page.

- Click the **Run** button and check the Process Monitor to see if the Full Data Publish process (EOP_PUBLISHT) is completed successfully.

Subsequent Incremental Synchronization

Follow the steps below to publish the newly added quick codes to HCM:

- Log on to CRM as an administrator user.
- Access the Quick Code page and search for a quick code with *HRH DU* in the **Business Unit** field.

Navigation: Set UP CRM, Product Related, Call Center, Quick Code

- Update one of the existing quick code, or create a new quick code and save the changes.

Verify the New Quick Codes

- Log on to HCM as an HRHD Administrator user.
- Open the AAF policy for the automatic case creation in design mode.

Navigation: Enterprise Components, Active Analytics Framework, Policies, Manage Policies.

- Click the **Edit Actions** button in the Actions section. This opens up the Edit Actions page.

This example illustrates configuring the actions on the Edit Actions page.

Build a Policy

Edit Actions

Policy

Name HRHD: Name is changed **Status** In Design

Description Name is changed for employee in a Regulatory Region.

Conditions

Person Name is changed
And Regulatory Region equals United States

Actions

	Action Type	Action Name	Status	Action Objective	
1	HHD - Create Cases	Create a Case	Active		First 1 of 1 Last Configure + -

- On the Edit Actions page, click the **Configure** button in the Actions section. This opens the Create Case Configuration page.

This example illustrates the Create Case Configuration page. You can search and select quick codes on this page.

Create Case Configuration

Create Case Configuration

Action Name

Action Type HHD - Create Cases

Action Name Create a Case

Policy

Name HRHD: Name is changed

Status In Design

Description Name is changed for employee in a Regulatory Region.

▼ Conditions

Person Name is changed

And Regulatory Region equals United States

Case Details

*Case Business Unit

*Quick Code Name Change

Problem Descriptions

The problem description for the case is given below:

Send the Name Change information to the Payroll and the Security department to issue a new access card.

5. Select *HRH DU* in the **Case Business Unit** field and search for quick codes in the **Quick Code** field. Verify whether all configured quick codes in CRM are listed.

Verifying the Configuration for Automatic Case Creation

To verify the automatic case creation setup, follow the steps below:

1. Log on to the HCM system as an HRHD Administrator user.
2. Access the Build a Policy page and activate the AAF setup for the feature. This involves checking if the policies and the triggers are enabled. You should also turn ON the AAF setting **Enable Runtime** to enable case creation.
3. Open the policy in Edit mode and modify either the case business unit or the quick code used for creating cases and save the changes. Make sure that the policy is activated.

4. Access the Workflow Configurations page and make sure that the **Allow DB Update** option is selected for the required self service transactions, for example, Name Change.
5. At runtime, access the Name Change self service transaction and change a person's last name in HCM. Submit the request. This event triggers the AAF policy created for name change.
6. The system publishes the case related information to CRM and creates an HR HelpDesk case through the Create Case EIP (HD_HRHD_CASE). Verify that the new case is created for the right employee (for whom the HR data was updated) and displays the correct default values (as selected in the policy action).

Troubleshooting Integration Issues

A list of common issues seen during automatic case creation, and their possible resolutions are listed below:

Issue	Solution
Unable to view transaction details; links on the Integration Broker Monitor are disabled.	To view transaction details on the monitor, the logged on user needs to be associated with a role that has the HRHD EIP service permission. E.g.: HRHD Administrator.
The transaction status of the service operation stays at New and would not update.	Make sure that the domain status is set to <i>Active</i> and the channel status for HRHD EIP services is set to <i>RUN</i> .
Unable to ping the remote node successfully and receives this error: "Asynchronous Message Handler: Access denied. Target and source message node passwords do not match."	Use the same password for both local and remote nodes in CRM and HCM. E.g.: PSOFT
Receives the following error while publishing EIP message: "PublicationContractManager::ProcessError/RetryResponse(): 'PSFT Authentication token failed for Node <local node name>. (158,454)'"	Use <i>Password</i> as the authentication option for local and remote nodes in both systems.
Receives error regarding Integration Broker Authentication: No node Authentication Option set for node <remote node name> on Target system.	Make sure that the remote node name on the local system is the same as the local node name on the remote system.
Receives error "PublicationContractManager:ProcessError/RetryResponse(): 'User XXX not authorized to invoke Service Operation HD_XXXXXXX. (158,536)'"	Make sure user XXX has the HRHD Administrator role in the target system.
No transaction was created in the Integration Broker Monitor after the EIP message for quick codes was supposed to be published.	Make sure that when the quick code sync process is set to run on the Full Data Publish page, the process frequency is set to <i>Once</i> .

Troubleshooting Quick Codes Issues

If the newly created quick codes are not displayed as expected in HCM, follow the steps below to see if the issue is EIP-related:

1. Log on to CRM and check the Process Monitor component of Process Scheduler to see if the process *EOP_PUBLISHT* is running successfully. Navigation: PeopleTools, Process Scheduler, Process Monitor.
2. Access the Monitor Overview page and check if the Integration Broker request result for full sync (HD_QUICK_CODE_FULLSYNC) or incremental sync (HD_QUICK_CODE_SYNC) is *Done*. Navigation: PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services.
3. Access the Operation Instances page to check if the **Transaction Status** of the service operation (HD_QUICK_CODE_FULLSYNC or HD_QUICK_CODE_SYNC) is *Done*.
4. If the process results in an error, click the **Error** link to get the error details

Note: If the above steps were completed without errors, it means that there are no issues with Integration Broker connectivity from the CRM side. You need to repeat the same steps in HCM also. Log on to HCM as an HRHD Administrator user and check for any Integration Broker issues on the HCM side.

Chapter 13

Processing Cases

Understanding Processing a Case

You perform some case management activities in the Case component on pages other than the Case page.

Pages that are present in PeopleSoft Support, PeopleSoft Analyst Service Center, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources are illustrated only once. Pages that show customer and contact fields are from PeopleSoft Support. Pages that show employee fields are from PeopleSoft HelpDesk cases.

Understanding Solutions

PeopleSoft ERMS, FieldService, Quality Management, and call center applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

You can search for solutions by clicking the **Find Solutions** button at the bottom of any page in the Case component, or you can access the Solutions page directly.

See “Finding and Attempting Solutions” (PeopleSoft Services Foundation).

Viewing the Case Summary Page

The Case Summary page enables users to see all the case information and case activity on a single page.

Modify the display template to control what information and sections you want to be visible on this page. The Case Summary page can consist of these sections:

- Problem
- Case Information
- Notes Summary
- Tasks
- Attempted Solutions
- Related Actions
- Related Cases

- Interested Parties
- Event History
- Billing Information

Note: The PeopleSoft system does not deliver all sections of the Case component as active. You must use the pages within the Display Template component to activate the pages, sections, and fields within the Case component that you want to use to implement your system.

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

Page Used to View the Case Summary Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Summary Page</u>	RC_CASE_SUMMARY	View all the case information on a single page.

Summary Page

Use the Summary page (RC_CASE_SUMMARY) to view all the case information on a single page.

Navigation:

- **Support > Search Cases > Case > Summary**
- **HelpDesk > Search Cases > Case > Summary**
- **HR HelpDesk > Search Cases > Case > Summary**
- **Analyst Service Center > Search Cases > Case > Summary**

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

Case

08/17/2009 10:04:08AM CDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> | Personalize

Case ID 220070

Customer Michelle Hudson

Summary Need to replace the hoses. Schedule a s...

Open Cases 1

Status Open - Awaiting User

Contact

Contact Method 516/331-1288(4578)

Customer Value Gold ★★★★★

Case

Solution (1)

Summary

Notes (1)

Tasks (0)

Case History

Related Cases (0)

Problem

*Summary

Need to replace the hoses. Schedule a service appointme

Description

Need to replace the hoses. Schedule a service appointment.

Case Information

Main

More

☐ Global Case

*Case Status Open - Awaiting User

Provider Group Appliances Western

Assigned To David Perry

Case Priority Low

Case Severity Reproducible

Notes Summary

Customize | Find | View All | 1 of 1 | First | 1 of 1 | Last

Select	Description	Type	Date Added	Added By
☐	Customer has had same issue with this ap... Customer has requested repair of this item six months ago. Check that seal is co...	(Internal Only)	08/17/2009 10:06AM CDT	Fred Dobbs

Email

View

Add Note

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

Attempted Solutions

Customize | Find | 1 of 1

Select	ID	Description	Date Modified	Added By	*Resolution Status
☐	301054	Scheduled SA Scheduled SA	08/17/2009 10:06:25AM CDT	Burt Lee	In Consideration

☐ Check All / Clear All

Email

View

Solve

Related Actions

No related actions have been added.

Related Actions

Go

Interested Parties

There are no Interested Parties for this Case.

Add Interested Parties

Save Case

Find Solutions

Escalate Case

Match Cases

Audit History

Created	02/12/2002 6:08PM PST	By SAMPLE	Burt Lee
Modified	08/17/2009 8:06AM PDT	By TEST	Fred Dobbs

Use the Summary page to view and manage case information from a single page.

Note: The number to the right of the tabs that appear at the top of the page indicates the number of items that appear on that page. For example, if the system displays the number 2 in parentheses on the Notes tab, then two notes are associated with the case.

Adding Notes and Attachments

This topic provides an overview of notes and attachments and discusses how to add notes and attachments to a case.

Page Used to Add Notes and Attachments

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Notes Page</u>	RC_CASE_NOTE	Track notes and attachments that are related to cases.

Understanding Notes and Attachments

Recording notes and attaching files to those notes is often essential to a user's work. Notes are the primary method that is used to track case research and communications. If you exchange files with the caller, you need to associate those files with the case.

PeopleSoft CRM provides a standard interface for working with notes and attachments across all the components that require this functionality. On the Case page, you can use text trays and quick keys to auto-fill static and dynamic data to create notes about a case. The Notes page is enabled when delivered.

Note: Once a case is closed, you can add a note on the Notes page by clicking the **Add Note** button or on the Summary page by clicking the **Add Note or Attachment** button. You cannot enter a note on the Case page in the Add a Note section.

Adding Case Notes for Inbound and Outbound Email

If the ERMS application is licensed and installed, you can set up the system to automatically add notes to cases when inbound email are received and outbound email are sent for them. When the **Add every notification as Note to the Associated Case** option is selected, the system adds a note to the case for each email it receives and delivers using the information from the email, as described in this table:

<i>Case Note Field Name</i>	<i>Field Value</i>
Subject	<Email subject>
Details	<Email body>
Visibility	<i>All</i>

Case Note Field Name	Field Value
Note Origin	<i>Inbound, Outbound, Outbound AAF, Outbound Solution, or Outbound Notes</i>
Note Type	<i>Notification</i>
Date Added	<Date and time of when the note was created>
Added By	• For inbound email: <PeopleSoft user who started the ERMS processes> • For outbound email sent by an agent: <agent who sent the email> • For outbound email sent by an AAF policy: <agent who triggered the policy on the case>
Customer	For inbound email: <customer who sent the email> For outbound email: <blank>
Contact	• For inbound email: <customer contact who sent the email> • For outbound email: <blank>
Employee	• Note for inbound email: <employee who sent the email> • Note for outbound email: <blank>

Here are a list of scenarios where the system adds a case note when an email is received or sent from a case:

- When an agent creates a case from an inbound email on the Recent Activities tab of the email workspace.
A case note for the inbound email is added to the new case.
- When a case is created automatically from an inbound email (based on a setup option).
A case note for the inbound email is added to the new case.
- When an agent associates an existing case to an inbound email from the email workspace.
A case note for the inbound email is added to the existing case.
- When an agent sends an email response for an inbound email on the email workspace and the inbound email is associated with a case.

A case note for the outbound email response is added to the case.

- When an agent sends an email response for an inbound email from a case.

A case note for the outbound email is added to the case.

- When an agent sends an outbound email (not a response) from a case.

A case note for the outbound email is added to the case.

- When a customer sends an email response (inbound email) for an agent's outbound email that is associated with a case.

A case note for the inbound email is added to the case.

- When an agent sends one or more solutions by email from a case.

A case note for the outbound email is added to the case.

- When an agent sends one or more notes by email from a case.

A case note for the outbound email is added to the case.

- When an AAF policy sends an outbound email from a case based on a triggering event.

A case note for the outbound email is added to the case.

- When an agent sends a reminder using the Set Reminder feature from a case.

A case note for the outbound reminder is added to the case.

See “System Installations Page” (PeopleSoft Multichannel Applications).

Notes Page

Use the Notes page (RC_CASE_NOTE) to track notes and attachments that are related to cases.

Navigation:

- **Support > Search Cases > Case > Notes**
- **HelpDesk > Search Cases > Case > Notes**
- **HR HelpDesk > Search Cases > Case > Notes**
- **Analyst Service Center > Search Cases > Case > Notes**

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

Case 08/17/2009 10:04:08AM CDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220070 **Status** Open - Awaiting User
Customer [Michelle Hudson](#) **Contact**
Summary Need to replace the hoses. Schedule a s... **Contact Method** 516/331-1288(4578)
Open Cases 1 **Customer Value** Gold ★★★★★

Case | Solution (1) | Summary | **Notes (1)** | Tasks (0) | Case History | Related Cases (0) | ▶

*Filter by Note Type Go

Notes Summary Customize | Find | View All | 1 of 1 | First | Last

Select	Subject and Details	Note Type	Date Added	Added By
☐	Customer has had same issue with this appliance (Internal Only) Customer has requested repair of this item six months ago. Check that seal is correct before replacing hose.		08/17/2009 10:06AM CDT	Fred Dobbs

☐ Check All / Clear All

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

Note Details

Added 08/17/2009 8:06AM Fred Dobbs

*Subject

Details

Format Font Size **B** **I** **U** **abc**

Customer has requested repair of this item six months ago. Check that seal is correct before replacing hose.

Note Information

*Visibility
 Note Type
 Origin Internal

Contact Information

☐ **Customer**
Contact
☐ **Employee**

[Add an Attachment](#)

Audit History

The **Notes Summary** region of the page includes the following fields:

Field or Control	Description
Filter by Note Type	Select a note type for the system to display notes by the selected note type in the Notes Summary section. Values are: <i>All</i> (default value) <i>Comment</i> <i>Customer Call</i> <i>Notification</i> <i>Research</i>
Subject and Details	Click the subject link to view and edit details of the note in the Note Details section that appears subsequently on the same page. These values are not available for edit if the case note is created automatically after sending or receiving a notification. A paperclip icon after the subject indicates that the note has one or more attachments.
Email	Click this button to send an email based on the selected note (s). Any attachments for the note will be available to include with the email. After a notification is sent, the Case Summary page is displayed. Users can view the notification history in the Notes Summary section of the Case Summary page. See “Understanding Manual Notifications” (Automation and Configuration Tools).
View	Click this button to view details of the selected note(s) displayed as a separate page.
Add Note	Click this button to add a note to the case.

The **Note Details** region of the page includes the following fields:

Field or Control	Description
Subject	Enter a summary description of the note.
Details	Enter the main information for the note.
Visibility	Select <i>Internal</i> to limit visibility of the note to internal workers: self-service users will not see this type of note. Select <i>All</i> to allow both internal workers and self-service users access to the note.

Field or Control	Description
Note Type	See “Setting Up Note Types” (Application Fundamentals).
Origin	Displays the origin of the case note. • If the note is added manually by an agent, by quick code, or by and AAF policy, the value is <i>Internal</i>. • If the note is added for a self service case, the value is <i>Self Service</i>. • If the note is added for an inbound or outbound email, the value can be <i>Inbound</i>, <i>Outbound</i>, <i>Outbound AAF</i>, <i>Outbound Solution</i>, or <i>Outbound Notes</i>.
To/From	Displays the sender or recipient email address for case notes of type <i>Notification</i>. If there are multiple recipients for an outbound email, the first 70 characters of all recipient email addresses will be displayed here. This information is only applicable to notification-specific case notes.
View Email	Click to view the email message that is associated with this case note. This link appears if the case note is created for an inbound or outbound email that is received or sent for the associated case.
Visibility	Select whether the note is visible to self-service users. Select <i>All</i> to show this note to both call center personnel and self-service users; select <i>Internal</i> (default value) to hide this note from self-service users.
Contact Information	(optional) Enter the customer contact or employee for whom the note is created.
Add an Attachment	Click this button to attach a file to the note. You will be able to add a description of any attachment that you add. You will also be able to control the visibility of the attachment to hide or display it to self-service users similar to the way that visibility can be controlled for the note.

Agents can use text trays and quick keys to auto-fill static and dynamic data and create notes about a case.

Note: Static data is text that is part of text tray entry, such as “Customer resolved problem on their own.” Dynamic data includes tokens that the system dynamically resolves when the entry is used. For example, if you want to include the agent's name in a note, you could create a text tray entry such as “Contact {agent name}.” In this example, the text in brackets is the token, and the system substitutes the agent's name when the full text is applied.

Editing Case Notes

Peoplesoft CRM provides the ability to update saved case notes to specific, authorized agents or employees. This ensures the authenticity of case records and provides a reliable foundation for decision-making and future reference. Only users with the role Case Note Edit Access can edit case notes. To edit case notes, you must enable the Case Note Edit Access checkbox in the Call Center Definition - Options page. For details on different options available on Call Center Definition page, see [Business Unit - Options Page](#).

Related Links

“Understanding Notes and Attachments” (Application Fundamentals)

Adding Tasks to a Case

The Tasks page provides call center agents with the ability to assign tasks to themselves or to other agents. Agents can add and update task information either on the Task page or on the **Task** section on the Case Summary page. They can also add a task or drill down to the Task Details page to create or update task details. Users can also create a task when the case is closed.

Page Used to Add Tasks to a Case

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Tasks Page	RC_CASE_TSK	Add tasks to a case.

Related Links

“Understanding AAF” (Automation and Configuration Tools)

“Task Group Template Page” (Application Fundamentals)

Tasks Page

Use the Tasks page (RC_CASE_TSK) to add tasks to a case.

Navigation:

- **Support > Search Cases > Case > Tasks**
- **HelpDesk > Search Cases > Case > Tasks**
- **HR HelpDesk > Search Cases > Case > Tasks**
- **Analyst Service Center > Search Cases > Case > Tasks**

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

Case 08/17/2009 10:39:41AM CDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220070 **Status** Open - Awaiting User
Customer [Michelle Hudson](#) **Contact**
Summary Need to replace the hoses. Schedule a s... **Contact Method** 516/331-1288(4578)
Open Cases 1 **Customer Value** Gold ★★★★★

Case | Solution (1) | Summary | Notes (1) | **Tasks (1)** | Case History | Related Cases (0) | ▶

Tasks Customize | Find | First 1 of 1 Last

Priority	Type	Subject	Task Status	Location	Start Date	End Date	Owner
	☑	Check connectors and perform sched. maintenance	Open		08/17/2009	08/17/2009	Fred Dobbs

Add Task | Task Group Add Task Group

Save Case | Find Solutions | Escalate Case | Match Cases

▼ **Audit History**

Created	02/12/2002 6:08PM PST	By	SAMPLE	Burt Lee
Modified	08/17/2009 8:22AM PDT	By	TEST	Fred Dobbs

Field or Control	Description
Type	Displays various icons to indicate the type of task that appears. For example, if the task type is <i>To Do</i> , the system displays a green box with a check mark.
Subject	Click this link to go to the Task Details page, where you can update task information, add notes, and reassign workers.
Add Task	Click this button to go to the Task Details page to add new tasks to the case and assign workers to the task. Users can also click this button to create a task after the case has been closed. See “Understanding Task Management” (Application Fundamentals).
Task Group	Select a group of tasks to be applied to the case.
Add Task Group	Apply the group of tasks specified in the Task Group field. All the individual tasks from the specified task group template will be added to the case. Note: The only task templates which will appear in this field are those which have a status of <i>Active</i> and which belong to the application usage selected for task templates on the corresponding Display Template ID.

Reviewing Case History

This topic provides an overview of case history and discusses how to review case history.

Pages Used to Review Case History

Page Name	Definition Name	Usage
<u>Case History - Events Page</u>	RC_ACTION_HIST	View a summary of important events in the life cycle of a case.
<u>Case History - Interactions Page</u>	RC_ACTION_HIST	View information about interactions related to the case.
<u>Case History - Assignments Page</u>	RC_ACTION_HIST	View information about case assignments.
<u>Case History - Audit Trail Page</u>	RC_ACTION_HIST	View detailed information about changes to specific fields in the case.

Understanding Case History

The Case History page has these four subtabs:

- Event History page

Event history provides a summary of the major events in the life cycle of a case.

- Interactions page

Case interactions are the sum of the events that take place when a customer or worker contacts the organization.

- Assignments page

This subtab lists all the provider group and agent assignments associated with the case. It also lists the amount of time and percentage of service level consumed by each assignment.

- Audit History page

Case auditing complements event history processing by providing an automated mechanism for keeping a detailed change history without cluttering the Event History page. Events are configurable.

There is some overlap in the data that these pages capture.

See “Case History Configuration Page” (Automation and Configuration Tools).

Event History Page

This page displays information about major events in the life of the case, including a description of the event and details of any field changes that are associated with the event.

AAF policies determines the events that are logged. In addition, each item references the policy name containing the case history action that logged the item. Policies are not active until you set them up.

The Interactions Page and the Audit History pages display information that also appears in the case history table. So, whenever there is an interaction, the system displays it on the Interactions page and in the case history table. The same is true for the Audit History page. Whenever a change is picked up by the Audit history page, the system displays it in the case history table.

See “Case History Configuration Page” (Automation and Configuration Tools).

Interactions Page

This page displays the events that occurred when a customer contacted the organization. An interaction is created every time a case is opened or accessed through computer telephony integration (CTI), from the 360-degree view, or in self-service.

The system also creates an interaction when agents send notifications, email, and correspondence. The system logs interactions automatically; so they cannot be turned on and off. An interaction may contain multiple subinteractions.

Assignments Page

This page provides a summary of all the provider group and agent assignments that have been associated to the case. The total elapsed time for each such assignment is displayed so that it is easy to see who has been working on the case and how long they have been working. If the case is associated with an agreement service level and restore time, the percentage of consumed restore time is displayed for each assignment, as well as for the case as a whole.

The percent of service level agreement restore time consumed is calculated as follows:

1. Count the total elapsed minutes from when the assignment was made to when it was changed or to when the case was completed

(For the current assignment of an active case, count the minutes from making the assignment to clicking on the Assignments page subtab.)

2. Subtract any minutes for which the customer was not entitled to service.

This is based on the service level and holiday schedule associated with the customer's agreement, as well as any time during which the case may have been on hold.

3. Divide the result by the total entitled restore time (in minutes) and multiply this by 100.

Consider the following example, in which a case was initially created and assigned to the provider group Appliances Western, and then one hour later was assigned to the agent Mason Orellana.

This is an example in which a case was initially created and assigned to a provider group and then reassigned to an agent.

Assigned Date	Provider Group	Assigned To	Elapsed Time	% SLA Consumed	Changed By
08/31/2007 1:45AM PDT	Appliances Western	Mason Orellana	02:00	8	Stu Marx
08/31/2007 12:45AM PDT	Appliances Western		01:00	4	Teresa Pine

In this example, the agreement restore time associated to the case is 1500 minutes (25 hours). The percent service level agreement (SLA) restore time consumed for the initial assignment is calculated as follows:

$$\% \text{ SLA Consumed} = [(\text{Date reassigned}) - (\text{Date assigned}) - (\text{Non-covered minutes per SLA})] / (\text{Restore time}) * 100$$

$$\% \text{ SLA Consumed} = [1:45 \text{ AM} - 12:45 \text{ AM} - 0] / 1500 * 100 = 4$$

$$\% \text{SLA Consumed} = [60 \text{ elapsed minutes} - 0 \text{ non-covered minutes}] / 1500 \text{ restore minutes} * 100 = 4 \text{ percent}$$

If the service level for the case agreement specified that the customer had no coverage from 1:00am to 6:00am, then the percent SLA consumed would be different, since 45 minutes of the elapsed time would not be covered by the service agreement. This would be calculated as follows:

$$\% \text{ SLA Consumed} = [(\text{Date reassigned}) - (\text{Date assigned}) - (\text{Non-covered minutes per SLA})] / (\text{Restore time}) * 100$$

$$\% \text{ SLA Consumed} = [1:45 \text{ AM} - 12:45 \text{ AM} - 45] / 1500 * 100 = 1$$

$$\% \text{ SLA Consumed} = [60 \text{ elapsed minutes} - 45 \text{ non-covered minutes}] / 1500 \text{ restore minutes} * 100 = 1 \text{ percent}$$

Note: If an agreement is changed on a case that already had an agreement, the percent SLA consumed will be reset to zero for all assignments unless the case is already late. In the event that the case has already missed the SLA and the agreement is changed, the % SLA Consumed values will remain unchanged.

Audit History Page

This page displays record-level changes to case data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). While the system can capture before and after values, no conditional logic exists to evaluate the before and after values of the fields. The system captures all audited actions regardless of the field value. Auditing is delivered disabled.

Related Links

“Understanding Audit Information” (Application Fundamentals)

“Understanding AAF” (Automation and Configuration Tools)

“Understanding Interactions” (Application Fundamentals)

Case History - Events Page

Use the Case History - Events page (RC_ACTION_HIST) to view a summary of important events in the life cycle of a case.

Navigation:

- **Support > Search Cases > Case > Case History**
- **HelpDesk > Search Cases > Case > Case History**
- **HR HelpDesk > Search Cases > Case > Case History**
- **Analyst Service Center > Search Cases > Case > Case History**

This example illustrates the fields and controls on the Case History - Events page.

Case

08/17/2009 10:49:42AM CDTMy Time Zone

Save

Print

Spell Check

360 360-Degree View

360 360-Degree Search

>>

Personalize

Case ID 124

Status Open - New Case

Customer MMA Property Management Group

Contact Teri Thomas

Summary Getting rid of permanent film on Glasses...

Contact Method 800/987-4563

Open Cases 13

Customer Value Gold ★★★★★

Case

Solution (1)

Summary

Notes (1)

Tasks (0)

Case History

Related Cases (0)

Events

Interactions

Assignments

Audit

Event History

CustomizeFind1-4 of 4

Date	Policy Name	Details	Visibility	Changed By
06/13/2000 6:07PM CDT		Case Note	All	STEWART,TOM
06/13/2000 6:07PM CDT		status of case is changed	All	STEWART,TOM
06/13/2000 6:07PM CDT		AssignedToChanged	All	STEWART,TOM
06/13/2000 6:07PM CDT		Case Note	All	STEWART,TOM

Save Case

Find Solutions

Escalate Case

Match Cases

Audit History

Note: To populate the **Event History** grid for adhoc email notifications that are sent from the case, use AAF to create policies. When you create the policy, use the term *Adhoc Email Subject*.

Field or Control	Description
Date	The date that the action occurred.
Policy Name	The system populates this field with the description of the action from the Event Definition page.
Details	Details about the action that was taken. For example, if a case is escalated or the assignment of a case changes.

Field or Control	Description
Visibility	The system displays either <i>All</i> or <i>Internal</i> to indicate who can view the details of the event.
Changed By	The name of the agent who initiated the event.

Case History - Interactions Page

Use the Case History - Interactions page (RC_ACTION_HIST) to view information about interactions related to the case.

Navigation:

Click the Interactions tab on the Case History page.

This example illustrates the fields and controls on the Case History - Interactions page.

Case 08/17/2009 9:46:40AM PDT History Select One... My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 141 **Status** Open - New Case
Customer Lakeview Community College **Contact** John Chase
Summary Removing frost build-up on the inside of... **Contact Method** 701/665-2587
Open Cases 5 **Customer Value** Gold ★★★★★

Case Solution (1) Summary Notes (0) Tasks (0) **Case History** Related Cases (0)

Events Interactions Assignments Audit

Interactions Customize Find 1 of 1

	Date/Time Created	Type	Channel	Contact Name	Subject/Description	Created By
	08/17/2009 9:46AM	Inbound	Phone	Lakeview Community College	Viewed/Updated Case ID 141	Stu Marx

Save Case Find Solutions Escalate Case Match Cases

Audit History

Field or Control	Description
Date/Time Created	The date and time the agent created the interaction.
Type	The type of interaction, either <i>Inbound</i> or <i>Outbound</i> .
Channel	The method used to initiate the interaction.
Contact Name	The name of the person who was contacted.

Field or Control	Description
Subject/Description	The subject or description of the interaction.
Created By	The name of the person who created the interaction.

Case History - Assignments Page

Use the Case History - Assignments page (RC_ACTION_HIST) to view information about case assignments.

Navigation:

Click the Assignments tab on the Case History page.

This example illustrates the fields and controls on the Case History - Assignments page.

Case 08/17/2009 10:30:09AM PDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220510 **Status** Open - Awaiting Engineering
Customer [Health Conscious.com](#) **Contact** [Gabrielle Sanchez](#)
Summary Condensor unit not working **Contact Method** 408/998-7146
Open Cases 8 **Customer Value** Gold ★★★★★

Case | Solution (0) | Summary | Notes (1) | Tasks (0) | **Case History** | Related Cases (0)

Events | Interactions | **Assignments** | Audit

Assignments Customize | Find | 1-2 of 2

Assigned Date	Provider Group	Assigned To	Elapsed Time	% SLA Consumed	Changed By
08/17/2009 10:25:43AM PDT	Appliances Western	Susan Davies	0:04	1	Stu Marx
08/17/2009 10:18:03AM PDT	Appliances Western	John Turner	0:07	2	Stu Marx

Total % SLA Consumed 3

Save Case | Find Solutions | Escalate Case | Match Cases

Audit History

Field or Control	Description
Assigned Date	The date and time that the assignment was created.
Provider Group	The provider group to which the case was assigned.
Assigned To	The agent to whom the case was assigned.
Elapsed Time	The total hours and minutes that have elapsed for this assignment.

Field or Control	Description
% SLA Consumed	The percentage of the service level agreement restore time that has been consumed during this assignment. Note: This column will not be displayed if the case is not associated with an agreement service level and restore time.
Changed By	The name of the person who made the assignment.
Total % SLA Consumed	The total percentage of the service level agreement restore time consumed for this case. Note: This field will not be displayed if the case is not associated with an agreement service level and restore time.

Case History - Audit Trail Page

Use the Case History - Audit Trail page (RC_ACTION_HIST) to view detailed information about changes to specific fields in the case.

Navigation:

Click the Audit tab on the Case History page.

This example illustrates the fields and controls on the Case History - Audit page.

Case 08/17/2009 10:33:35AM PDT My Time Zone

Save | Print | Spell Check | 360-Degree View | 360-Degree Search | >> Personalize

Case ID 220511 Status Open - Awaiting User
 Customer [Health Conscious.com](#) Contact [Gabrielle Sanchez](#)
 Summary Condensor failing Contact Method 408/998-7146
 Open Cases 9 Customer Value Gold ★★★★★

Case Solution (0) Summary Notes (1) Tasks (0) Case History Related Cases (0)

Events Interactions Assignments Audit

Audit History Customize Find 1 of 1

Record Name	Field Name	Action Taken	Date/Time	Changed By	Value Before Change	Value After Change
RC_CASE_NOTE		Add	08/17/2009 10:35AM PDT	Stu Marx		

Save Case Find Solutions Escalate Case Match Cases

Audit History

Created	08/17/2009 10:34AM PDT	By	VP1	Stu Marx
Modified	08/17/2009 10:35AM PDT	By	VP1	Stu Marx

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, changing, or deleting). However, no conditional logic exists to evaluate the before and after values of

the field. The system captures all audited actions regardless of the field value. The fields at the top of the columns are self explanatory or similar to the ones explained on the other pages.

Managing Related Cases

This topic provides an overview of related cases and discusses how to manage related cases.

Pages Used to Manage Case Relationships

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Related Cases Page	RC_RELATIONSHIP	Manage case relationships, relate cases to each other based on case relationship types that your organization has established, and view and delete existing case relationships. Your organization must define case relationship types and workflow rules for cascading statuses through related cases.
Search Cases Page	RC_CASE_SEARCH_SEC.	Select a case to relate to the current case.
Relate Existing Case - Relationship Page	RC_REL_TYPE_SEC	Specify the relationship details when relating a case to an existing case.
Create a New Case - Relationship Page	RC_REL_COPY	Specify the relationship details when you create a new related case. You can also specify which information from the originating case to copy into the case that you are creating.

Understanding Related Cases

Users can relate cases to each other for numerous reasons. Your organization establishes valid case relationship types on the Case Relationship Type page. Each relationship is marked as hierarchical or equivalent (non-hierarchical). Each case in a relationship has a relationship label. If the relationship is hierarchical, the parent case and the child case have separate labels. If the relationship is equivalent, only one valid label exists.

When defining hierarchical relationship types, you can select the **Set Parent As Global Case** option to make the system automatically designate the parent case as a global case as soon as you establish a relationship between that case and a child case.

See [Setting Up Case Relationship Types and Labels](#).

You can easily search for similar cases from the Case page (using the **Match Cases** button) or from the 360-Degree View page in order to identify cases that should be related to each other.

The Case Relationships page displays a list of all cases that are related to the current case. Relationships are always reciprocal. If case A is related to case B, then the Related Cases page for both cases reflects the relationship. However, child cases of a common parent do not appear on each other's Related Cases page. Use the Related Cases page of the parent case to see all case relationships at a glance.

Similarly, two cases that are equivalent to a third case do not appear on each other's Related Cases page. That is, the fact that case A is equivalent to both case B and case C does not establish a relationship between case B and case C. To see all equivalent cases in one place, you must make the equivalent cases into children of a common parent.

You can easily choose to make the system cancel any duplicate cases that you identify by associating them with the appropriate original case using a relationship type that has been set to use the option entitled **Set status of child case using duplicate case status from the Call Center Business Unit Defaults**.

See [Setting Up Case Relationship Types and Labels](#).

Your organization can also use the AAF Case Relationship action to cascade case statuses. You can write a policy to use this action to cascade statuses from a parent case to all of its child cases.

For example, this is useful if your organization establishes a global relationship type for tracking problems where a single solution (such as rebooting a server) fixes a problem for multiple people. In this situation it may make sense to automatically close all child cases when the parent case is closed. When the status cascades to children, any status-related workflow for the child case is triggered, including cascading statuses to the child case's children.

Note: The Case Relationship policy is delivered inactive in the Case Status Changed policy.

Methods for relating cases are:

- Relate the current case to another existing case.

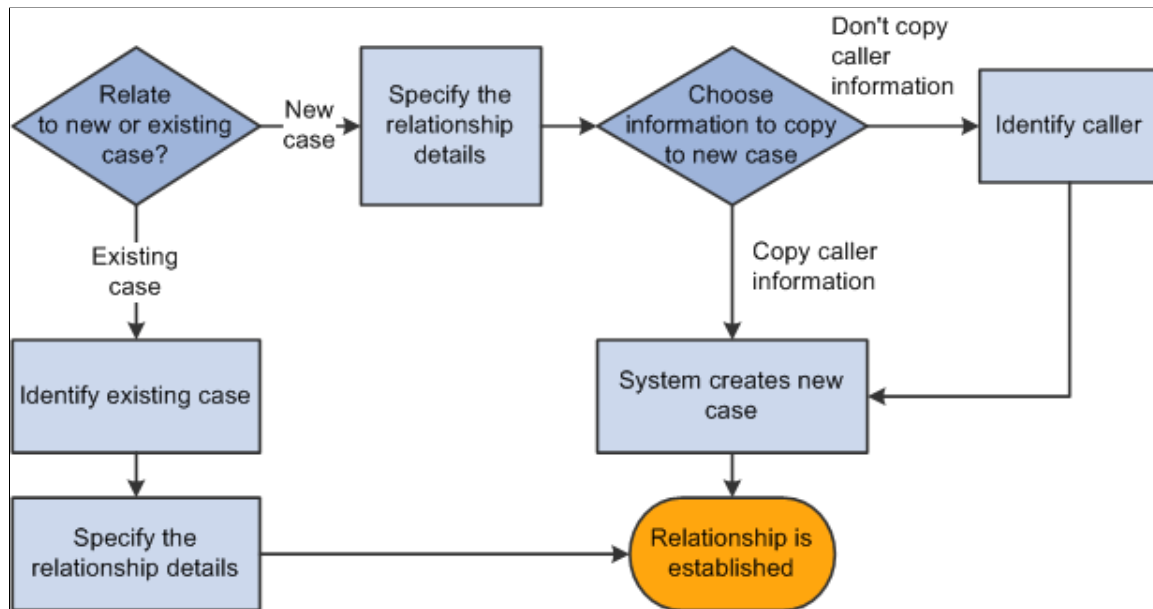
For example, you receive four calls reporting problems about your web server before you recognize that this is a global problem. The four cases that you've already created need to be related to each other. When you relate the cases, you can choose one as the parent case and make the other three into children or you can make all four of the original cases into children of a new parent case.

- Create a new case and relate it to the current case.

For example, you've established a global case for your web server problem. Someone calls to report the problem. From the existing global case, you can create a new child case and copy the problem information into the new case.

Note: You can also modify the display template to enable the user to relate a case to a new or an existing case on the Case Summary page.

This diagram illustrates the methods for relating cases, depending on whether the case in question is new or existing.



Identifying Potentially Related Cases

While reviewing or creating a case you can click the **Match Cases** button on any page of the case component to search for similar cases using predefined match criteria. Once similar cases are found, you can quickly relate the case to one of the similar cases, such as designating it as the related child of a global case or as a duplicate case that is to be cancelled.

See [Managing Basic Case Information](#).

You can also view potentially related cases for a particular customer or employee by looking at the 360-Degree View. As delivered, the relevant 360-Degree views will contain a folder for global cases with the following nodes:

- *Related*: The **Related** node displays the global cases for which a related case is already created for the customer or employee. If the global case is for the customer or employee whose 360-Degree View is being displayed, the case will show in the related node
- *Not Related*: The **Not Related** node displays cases that are not yet related to the customer or employee but which might impact them. It lists existing global cases whose products are the same as those for the installed products of the customer or employee. It also lists global cases that are not associated with any product.
- *View All*: The **View All** node lists all the global cases from the **Related** and **Not Related** nodes.

Selecting any of the nodes from the Global Cases folder will populate the related dynamic grid with information about those cases. Use this grid to see information from the list of global cases or transfer to a global case by clicking on its Case ID link.

Note: When the link of a secure global case is selected, you will not be able to access the case unless you are in the provider group assigned to that case. Similarly, for secured cases, the **Summary**, **Product**, **Case Type**, and **Incident Location** fields will display the word *Secured* instead of the relevant data.

When viewing the **Not Related** or **View All** dynamic grids, you can perform a related action on a global case by selecting its row on the grid and choosing the desired action from the **Related Actions** list. As delivered, the following two actions will be available.

- *Add Child Case:* The **Add Child Case** action automatically creates a child case and links it to the selected global case. The new case will contain the customer or employee details associated with the current 360-Degree View, and the **Problem** and **Resolution** of the global case will be copied over to the new case. If the 360-Degree View has been opened for a company without a contact and the *Add Child Case* action is selected, you will be prompted to search and select the company contact.
- *Add Interested Party:* The **Add Interested Party** action will add the contact of the customer as an interested party to the global case, and will apply the reason specified from the *Reason Interested* field on the Options page of the Business Unit Call Center Definition setup component. If the 360-Degree View has been opened for a company without a contact and the *Add Interested Party* action is selected, you will be prompted to search and select the company contact.

The Global Cases folder and related dynamic grid on the 360-Degree View is shown here.

This example illustrates the fields and controls on the 360-Degree View page with Global Cases folder expanded.

360-Degree View

Refresh | New Search | Add to My Contacts | CTI Dialout | Personalize

360-Degree View | Relationship Viewer | Tasks | Call Reports

*Role: Company | Actions: Add Case | Go

Summary

Customer: Health Conscious.com
 Phone: 800/225-4687
 Email: healthconscious@hc.com
 Address: 6544 San Tomas Blvd, San Jose, CA, 98744, USA
 Segment: Retail
 Extension:
 Status: Active
 Customer Value: Gold ★★★★★
 Apply Changes

Activities

*Date Filter: 6 - Last Year
 First | Previous | Next | Last | Left | Right

Overview of - Health Conscious.com

- Global Cases
 - Related - (1)
 - Not Related - (0)
 - View All
- Recommendations - (3)
 - Current - (3)
 - Past - (0)
- Agreements - (3)
- Installed Products - (10)

Global Case (Related)

Show All Columns

Customize | Find | View All | First | 1 of 1 | Last

Case ID	Summary	Child Cases	Product
220511	Condensor failing	0	

Add Interaction Note

Current Actions

Relating a Case to an Existing Case

To relate a case to an existing case:

1. On the Related Cases page, click the **Relate an Existing Case** button.

The Search Cases page appears.

2. Use the Search Cases page to identify the case that you want to associate with the current case.

Enter search criteria to help you find the case and click the **Search** button. The system returns a list of cases that match your criteria. To select a case, click that case in the results list. The Relate Existing Case - Relationship page appears.

If your search criteria uniquely identifies a case, the system bypasses the list of search results and displays the Relate Existing Case - Relationship page.

3. Use the Relate Existing Case - Relationship page to specify the relationship details.

Specify a relationship type and choose relationship labels for each of the cases. Valid relationship types are defined by your organization and are based on the business unit of the case.

4. Click OK.

The system establishes the relationship and saves the case. The new case relationship appears on the Related Cases page.

Another way to relate an existing case to another is to click the **Match Cases** button on any page of the Case component, and select the desired case to relate to the current one from among the displayed results.

See [Managing Basic Case Information](#).

Creating and Relating a New Case

To create a new case related to the current case:

1. On the Related Cases page, click the **Create and Relate a New Case** button.

The Create a New Case - Relationship page appears.

2. Use the Create a New Case - Relationship page to specify the relationship details.

Specify a relationship type and choose relationship labels for each case. Your organization defines valid relationship types based on the business unit of the case.

3. Select the information to copy from the original case to the new case.

You can copy the customer or employee information, problem information, and resolution information.

4. Click OK.

Customer or employee information is required for all cases. Therefore, if you choose to *not* copy caller information, the Create a New Case - Relations page appears so that you can identify the company-contact or the consumer-employee contact for whom you are creating and relating a case.

Note: Contact information is optional if you are creating a case for a consumer.

If you choose to copy the caller information, the system immediately creates the new case and returns you to the Related Cases page. The newly established case relationship appears in the **Existing Related Cases** grid. Select the case link in the **Related Cases** grid to transfer to the new case.

Related Links

[Setting Up Case Relationship Types and Labels](#)

Related Cases Page

Use the Related Cases page (RC_RELATIONSHIP) to manage case relationships, relate cases to each other based on case relationship types that your organization has established, and view and delete existing case relationships.

Your organization must define case relationship types and workflow rules for cascading statuses through related cases.

Navigation:

- **Support > Search Cases > Case > Related Cases**
- **HelpDesk > Search Cases > Case > Related Cases**
- **HR HelpDesk > Search Cases > Case > Related Cases**
- **Analyst Service Center > Search Cases > Case > Related Cases**

This example illustrates the fields and controls on the Related Cases page.

Case 08/17/2009 10:50:16AM PDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220511 Status Open - Awaiting User
 Customer [Health Conscious.com](#) Contact [Gabrielle Sanchez](#)
 Summary Condensor failing Contact Method 408/998-7146
 Open Cases 9 Customer Value Gold ★★★★★

Case Solution (0) Summary Notes (1) Tasks (0) Case History Related Cases (1)

Related Cases Customize | Find | View All | First 1 of 1 Last

Relationship	Type	Case	Customer	Contact	Status	Date Added	
Equal	Equivalent	220510	Health Conscious.com	Gabrielle Sanchez	Open - Awaiting Eng	08/17/2009 10:55AM PDT	Delete

Relate an Existing Case Create and Relate a New Case

Save Case Find Solutions Escalate Case Match Cases

Audit History

The **Related Cases** grid lists all existing case relationships.

Field or Control	Description
Relationship	Describes how the current case relates to the related case. If the relationship is hierarchical, the parent case and the child case can have different values in this field. For example, one value might be <i>Global Case</i> and the other value might be <i>Ticket</i>. If the relationship is equivalent, only one label is valid.

Field or Control	Description
Type	The relationship type. This value is the same for both cases in the relationship. For example, if your organization established a relationship type called <i>Global</i> , then both the parent and child record have <i>Global</i> in the Type column.
Case	The case number of the related case. Click the case number link to display the related case.
Customer and Name	For a PeopleSoft Support case, these fields identify the customer and contact who are associated with the related case.
Employee and EmplID (employee ID)	For a PeopleSoft HelpDesk case, these fields identify the employee who is associated with the related case.
Status	The status of the related case. The system gets this information from the Case Status field for the case.
Date Added	The date and time that the relationship was established.
Delete	Click to delete the case relationship. Clicking this button does not delete either case, only the relationship.

Creating New Case Relationships

Field or Control	Description
Relate an Existing Case	Click to display the Relate Existing Case - Search page, where you identify an existing case to relate to the current case. After you identify the case, the system displays the Relate Existing Case - Relationship page, where you establish the relationship between the cases.
Create and Relate a New Case	Click to display the Create a New Case - Relationship page, where you can choose the information to be copied to the new case and establish the relationship between the cases.

Relate Existing Case - Relationship Page

Use the Relate Existing Case - Relationship page (RC_REL_TYPE_SEC) to specify the relationship details when relating a case to an existing case.

Navigation:

Select the case on the Relate Existing Case - Search page.

This example illustrates the fields and controls on the Relate Existing Case - Relationship page.

Relate Existing Case

Relationship

Select the relationship characteristics between Case 220511 and Case 220070.

Relate an Existing Case

*Relationship TypeGlobal

*Case 220511Parent

*Case 220070Child

OK

Cancel

* Required Field

Field or Control	Description
Relationship Type	Specify a relationship type. Relationship types can be either hierarchical (parent-child) or nonhierarchical. Your organization defines values that are based on the business unit of the case.
Case (current case number) and Case (related case number)	Select relationship labels for the current case and the case that you're relating to it. If the relationship is hierarchical, one valid label exists for the parent case and one valid label exists for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship. If the relationship is not hierarchical, only one valid label exists. Select that label for both cases.

Related Links

[Case Relationship Type Page](#)

Create a New Case - Relationship Page

Use the Create a New Case - Relationship page (RC_REL_COPY) to specify the relationship details when you create a new related case.

You can also specify which information from the originating case to copy into the case that you are creating.

Navigation:

Click the **Create and Relate a New Case** button on the Related Cases page.

This example illustrates the fields and controls on the Create a New Case - Relationship page.

Create a New Case

Relationship

Characteristics

Select the relationship characteristics between the two cases.

***Relationship Type**

***Case 220511**

***New Case**

Information

Select information to be copied from case 220511 to the new case.

☒ **Customer**

☒ **Problem**

☐ **Resolution**

* Required Field

Characteristics

<i>Field or Control</i>	<i>Description</i>
Relationship Type	Specify a relationship type. Relationship types can be either hierarchical (parent-child) or nonhierarchical. Values are defined by your organization and are based on the business unit of the case.
Case (current case number) and New Case	Select relationship labels for both the current case and the new case that you're creating. If the relationship is hierarchical, one valid label exists for the parent case and one valid label exists for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship. If the relationship is not hierarchical, only one valid label exists. Select that label for both cases.

Information

The system always copies the business unit to the new case. You choose which other information to copy to the new case.

Field or Control	Description
Customer	In PeopleSoft Support, select this check box to copy the caller from the originating case to the new case. The system copies the customer, contact, site, PIN (person identification number), SIN (site identification number), contact method, and contact details.
Employee	For PeopleSoft HelpDesk applications, select this check box to copy the caller from the originating case to the new case. The system copies the employee number, employee name, phone type, email address type, contact method, contact details, and alternate contact.
Problem	Select to copy problem information from the originating case to the new case. The system copies the problem summary, description, case status, case type, source, priority, severity, impact, error code, error message, resolved on first contact, closed date and time, provider group, assignee, product, problem type, serial number, asset tag, and category, type, and detail information. If you do not copy problem information, the summary for the newly created case identifies the originating case. Note: If you don't copy caller information to the new case, then the product, serial number, and asset tag that are copied might not be valid for the caller that you identify. In this situation, modify the values before saving the case.
Resolution	Select this check box to copy resolution information from the originating case to the new case. The system copies all attempted resolutions and their statuses, but not the resolution notes.
OK	Click this button to create the new case, establish the relationship between the two cases, and return to the Related Cases page. If you are not copying caller information, the system prompts you to identify the caller for the new case before the case is created.
Cancel	Click this button to return to the Related Cases page without establishing the relationship.

Related Links

[Understanding Case Management](#)

Setting Up Case Relationship Types and Labels

Managing Related Actions

This topic discusses how to manage related actions.

Pages Used to Relate a Case to Other PeopleSoft CRM Objects

Page Name	Definition Name	Usage
Related Actions Page	RC_ASSOCIATION	Relate a case to other PeopleSoft CRM objects. In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HR database. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.
Use Business Project Page	RC_LINK_GENBP_SEC	Associate business projects with a case.
Send Case Survey Page	RC_LINK_SEND_SRVY	Send case surveys to existing customers.
Branch Script Page	RC_LINK_SCRIPT_SEC	Select a branch script to relate to a case.
Defects and Enhancements Page	RC_CASE_DEFECT_SEC	Search for and identify a defect to relate to the case.
Quality Management - Defect Page	RQ_DEFECT_MAIN	Add a new defect and relate it to the case.
Create Sales Lead Page	RC_LINK_LEAD_SEC	Create a sales lead and relate it to the current case.
Create Order Page	RC_LINK_RO_SEC	Create an order and relate it to the current case.
Return Material Authorization Page	RC_RMA_HDR	Create an RMA and relate it to the current case.
Create Service Order Page	RC_LINK_RO_SEC	Create a service order and relate it to the current case.
Change Requests Page	RC_CASE_CHANGE_SEC	Search for and identify a change request to relate to the case.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Change Request Page</u>	RG_CHANGE_REQUEST	Create change requests.

Understanding Related Actions

In PeopleSoft CRM, you can:

- Manually create a related action on a case.
- Configure the system so that selecting a quick code suggests an action.
- Configure the system so that PeopleSoft's AAF system suggests an action.

Related Actions for PeopleSoft Support, HelpDesk, and Service Center for Higher Education Cases

This table lists and describes delivered actions you can associate with PeopleSoft Support, PeopleSoft HelpDesk, and Service Center for Higher Education cases:

Important! Some of the listed actions are role-specific (for example, worker, company contact, or consumer). If an action is attempted for someone whose role does not permit that action, or if that someone is associated with more than one role and the system is unable to determine for which role that action should be created, an error message will be displayed to inform the user that the action is not available.

Note: In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HR database instead of the related actions listed below. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.

<i>Link</i>	<i>Description</i>	<i>Applicable To</i>	<i>Role-Specific?</i>
Asset Administrator	Launches an asset management application from a case to gather information about network devices.	HelpDesk, and Higher Education cases	Worker
Asset Summary	Launches an asset management application, which passes the desired asset information to the application for reporting.	HelpDesk, and Higher Education cases	Worker
Branch Script	Launches a specified branch script.	Support and Higher Education cases	Consumer or Company Contact

Link	Description	Applicable To	Role-Specific?
Business Project	Launches the Use Business Project page, which lets the user select a business project that they want to associate with the case. You can set up additional link definitions to launch a specific business project.	Support, HelpDesk, and Higher Education cases	No
Case Survey	Launches the Send Case Survey page, where an agent can enter a business unit, dialog name, and action to send a survey to the customer. Important! You can also set up this link to automatically launch a survey and bypass the Send Case Survey page. In addition, the PeopleSoft system delivers the roles of Call Center Manager and Help Desk Manager to this permission list to be used for the new survey reports. Users who are not authorized to view the reports will not be able to see the links in the Related Actions field.	Support and Higher Education cases	No
Change Request - Create New	Creates a new change request.	HelpDesk, and Higher Education cases	Worker

Link	Description	Applicable To	Role-Specific?
Change Request - Relate Existing	Relates an existing change request to the case. For example, you may want to use Change Request - Relate Existing when a caller has a problem with their email system. The agent knows that this has been a reported problem in the past and finds a related change request. Through Related Actions, the agent associates this new case to the existing change request.	HelpDesk, and Higher Education cases	Worker
Create RMA	An RMA authorizes a customer to return defective or unwanted materials.	Support and Higher Education cases You can manage RMAs only if PeopleSoft Support is integrated with PeopleSoft Inventory.	Consumer or Company Contact
Defect - Create New	Create defects to identify problems with your products.	Support, HelpDesk, and Higher Education cases	No
Defect - Relate Existing	Associate existing defects with cases.	Support, HelpDesk, and Higher Education cases	No
Remote Control	Launches the asset management application from a case to perform troubleshooting on a remote device, such as an employee's laptop.	HelpDesk, and Higher Education cases	Worker
Sales Lead	Sales leads populate the sales pipeline.	Support and Higher Education cases You can create sales leads only if you have implemented PeopleSoft Sales.	Consumer or Company Contact

Link	Description	Applicable To	Role-Specific?
Sales Order	A sales order records a request for a product that is provided by your company's sales, marketing, or field services organization.	Support and Higher Education cases You can create sales orders only if you've implemented PeopleSoft Order Capture.	Consumer or Company Contact
Service Order	A service order records a request for a service that is provided by your company's field services organization.	Support and Higher Education cases You can create service orders only if you've implemented PeopleSoft FieldService.	Consumer or Company Contact
Software Delivery	Launches your third-party Software Delivery application, which can be used to install software on various identified assets.	HelpDesk, and Higher Education cases	Worker
Work Order - Create New	Launches the Create Work Order page, where an agent who is working on a help desk case can create a work order from the case to assign a technician to troubleshoot and solve the problem.	HelpDesk, and Higher Education cases	Worker

See [Link Group Page](#).

See “Understanding Display Templates” (Automation and Configuration Tools).

Service Order and Material Return Comparison

When customers report problems with broken or defective parts or materials, you can do one of the following:

- If the customer is entitled to on-site service, create a service order so that your organization can send a field service technician to the customer's site to repair the part.
- If the customer is not entitled to on-site service, create a return material authorization (RMA) so that the customer can return the merchandise.

Related Actions Page

Use the Related Actions page (RC_ASSOCIATION) to relate a case to other PeopleSoft CRM objects.

In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HR database. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.

Navigation:

- **Support > Search Cases > Case**

Scroll down to the Actions section.

- **HelpDesk > Search Cases > Case**

Scroll down to the Actions section.

- **HR HelpDesk > Search Cases > Case**

Scroll down to the Actions section.

- **Analyst Service Center > Search Cases > Case**

Scroll down to the Actions section.

This example illustrates the fields and controls on the Related Actions page.

The screenshot shows the 'Case' page in PeopleSoft. At the top, there's a header with the date '08/17/2009 10:50:16AM PDT' and a 'My Time Zone' dropdown. Below the header is a navigation bar with buttons: 'Save', 'Print', 'Spell Check', '360 360-Degree View', '360-Degree Search', and 'Personalize'. The main content area displays case details: 'Case ID 220511', 'Customer Health Conscious.com', 'Summary Condensor failing', 'Open Cases 9', 'Status Open - Awaiting User', 'Contact Gabrielle Sanchez', 'Contact Method 408/998-7146', and 'Customer Value Gold ★★★★★'. Below this is a tabbed interface with 'Notes (1)', 'Tasks (0)', 'Case History', 'Related Cases (1)', 'Related Actions (1)', and 'Interested Parties (0)'. The 'Related Action Summary' table is visible, showing one entry: 'Service Order' with 'Summary SVC0300002 - Repair Air Condit...', 'Status Open', 'Date Created 08/17/2009 11:06AM PDT', and 'Added By Stu Marx'. Below the table is a 'Related Actions' section with a dropdown menu set to 'Case Survey' and a 'Go' button. At the bottom, there are buttons for 'Save Case', 'Find Solutions', 'Escalate Case', and 'Match Cases', followed by an 'Audit History' link.

Related Actions Summary

This grid lists all existing relationships between the current case and other PeopleSoft CRM objects.

Field or Control	Description
Type	The types of related objects include: <i>Customer Satisfaction Script</i> , <i>Lead Qualification Script</i> , <i>Troubleshooting Guide</i> , <i>Business Project</i> , <i>Sales Lead</i> , <i>Sales Order</i> , <i>RMA</i> , <i>Quality Defect</i> , or <i>Service Order</i> .

Field or Control	Description
Summary	A description of the object, derived from the description field on the page where the object is maintained.
Status	Indicates the status of the related object that is associated with the case.
Date Created	The date that the object was created and associated with the case.
Related Actions	Select the type of action that you want to create and relate to the case. Note: Based on the products that you have installed you may want to change the list of objects that appear in the drop-down list box. For example, if you don't have PeopleSoft FieldService installed, you wouldn't want Service Order to appear. See “Industry-Specific Translates Page” (Automation and Configuration Tools).
Go	After you select an action, click Go to access the page where you enter information specific to the type of object that you're creating.
Refresh Related Actions	Click this button to refresh the Status field for the work orders or other related actions that you executed from this page. This button is hidden when you first install the application. You must use the Display Template pages to configure this page to display the button.

Use Business Project Page

Use the Use Business Project page (RC_LINK_GENBP_SEC) to associate business projects with a case.

Navigation:

- In the Actions section on the Case page, select *Business Project* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Business Project* from the **Related Actions** drop-down list box, then click the **Go** button.

- In the Related Actions section on the Related Actions page, select *Business Project* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Use Business Project page.

Select the business project that you want to use for the case. Click the **Use Business Project** button to launch the business project.

Related Links

“Understanding Business Projects” (Automation and Configuration Tools)

Send Case Survey Page

Use the Send Case Survey page (RC_LINK_SEND_SRVY) to send case surveys to existing customers.

Navigation:

- In the Actions section on the Case page, select *Case Survey* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Case Survey* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Case Survey* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Send Case Survey page.

Select the business unit, dialog name, and action that you want to use to send a survey to the customer associated with the case; click **OK**.

Note: You can also set up this link to automatically launch a survey and bypass the Send Case Survey page. To do this, you must modify the system data and use the **Search Keys** group box on the Link Definition page to select the last three terms that appear under Call Center, Link Definition after you select the **Add Term** button. There terms are: *Select a Dialog Business Unit <BUSINESS_UNIT>*, *Select a Dialog ID <DIALOG_ID>*, and *Select an External Event Trigger <EXT_EVENT_TRIGGER>*.

Related Links

[Understanding Link Setup](#)
“Understanding Surveys” (PeopleSoft Online Marketing)

Branch Script Page

Use the Use Branch Script page (RC_LINK_SCRIPT_SEC) to select a branch script to relate to a case.

Navigation:

- In the Actions section on the Case page, select *Branch Script* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Branch Script* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Branch Script* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Use Branch Script page.

Case

Use Branch Script

Select a Branch Script to use for this case.

Branch Script

11000100

Script Name

Digital Wireless Package Promotion

Use Branch Script

Cancel and Return to Case

* Required Field

Note: You can relate a different branch script multiple times to a single case. You can also relate the same branch script to a single case multiple times.

Field or Control	Description
Branch Script	Select the desired script from the predefined scripts available in the list.

Field or Control	Description
Use Branch Script	Click to launch the script on the Execute Script page. Once you launch the script, the relationship between the case and the script is established.

Related Links

“Understanding Scripts” (Automation and Configuration Tools)

Defects and Enhancements Page

Use the Defects and Enhancements page (RC_CASE_DEFECT_SEC) to search for and identify a defect to relate to the case.

Navigation:

- In the Actions section on the Case page, select *Defect - Relate Existing* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Defect - Relate Existing* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Defect - Relate Existing* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Defects and Enhancements page.

Defects and Enhancements

Search for Related Defect

Business Unit = APP01 AND Status = OPEN

Search

* Required Field

Defects and Enhancements						
Defect ID	Business Unit	Type	Status	State	Product	Production ID
300001	APP01	Defect	OPEN	To Fix	7.2 cu. Ft. Lab Freezer	MODEL 1.0E
DEF000000300002	APP01	Defect	OPEN	To Test	Custom Build Freezer Package	MODEL 1A
DEF000000300003	APP01	Enhance	OPEN	Under Review	Custom Build Freezer Package	MODEL 1A
DEF000000300004	APP01	Defect	OPEN	To Fix	7.2 cu. Ft. Lab Freezer	MODEL 1.0E
DEF000000300005	APP01	Defect	OPEN	To Test	7.2 cu. Ft. Lab Freezer	MODEL 1.0E

Cancel

On this page, you can sort and filter to narrow down your list of defects, or you can search for other defects.

<i>Field or Control</i>	<i>Description</i>
Business Unit	Select the business unit for the defect that you want to relate to the case. The default comes from the Business Unit (Quality) field in the Call Center BU page.
Defect ID	Select the defect that you want to relate to the current case.

Related Links

[Defining Call Center Business Units](#)

“Understanding AAF” (Automation and Configuration Tools)

Quality Management - Defect Page

Use the Quality Management - Defect page (RQ_DEFECT_MAIN) to add a new defect and relate it to the case.

Navigation:

- In the Actions section on the Case page, select *Defect - Create New* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Defect - Create New* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Defect - Create New* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Quality Management - Defect page (1 of 2).

Quality Management History Select One...

Save Refresh | Notification | Clone | Search | Personalize

Defect Id NEXT **Status** OPEN
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions ▶

▼ Defect Information

*Date Reported 📅 *Business Unit ▼

Reported By 🔍 📅 *Status ▼

*Type ▼ *State ▼

*Subject 📎 🔍 *Reason ▼

Description 📎 🔍 *Priority ▼

Duplicate of 🔍 📅 *Severity ▼

Date Resolved

Duplicate Subject

This example illustrates the fields and controls on the Quality Management - Defect page (2 of 2).

Product Information

*Product

*Production ID

Version

Component ID

*Symptom

*Product Impact

Phase

Suspect. Cause

Repeatability

Verified On

Verified By

Responsible Parties

No Responsible Parties have been added.

Currently assigned to this defect. |

Environment

Audit History

| Notification | Clone | Search | [Top of Page](#)

* Required Field

For instructions about using the Quality Management - Defect page:

See [Understanding Defect and Fix Tracking](#).

Create Sales Lead Page

Use the Create Sales Lead page (RC_LINK_LEAD_SEC) to create a sales lead and relate it to the current case.

Navigation:

- In the Actions section on the Case page, select *Sales Lead* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Sales Lead* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Sales Lead* from the **Related Actions** drop-down list box, then click the **Go** button.

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

Case

Create Sales Lead

Enter the Business Unit and description for this lead.

Business Unit

Description

[Cancel and Return to Case](#)

* Required Field

Note: Only PeopleSoft Support or Service Center for Higher Education users can create sales leads. This functionality is not available in PeopleSoft HelpDesk applications.

Field or Control	Description
Business Unit	Select a sales business unit for the lead that you're creating. The default comes from the Sales Unit field on the Call Center BU page.
Description	Enter a description for the new lead.
Create Sales Lead	Click to create the lead.

Related Links

“Creating a Sales Lead” (PeopleSoft Sales)

“Creating a Sales Opportunity” (PeopleSoft Sales)

Create Order Page

Use the Create Order page (RC_LINK_RO_SEC) to create an order and relate it to the current case.

Navigation:

- In the Actions section on the Case page, select *Sales Order* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Sales Order* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Sales Order* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Create Order page.

Case

Create Order

Enter Business Unit and Description for this order.

***Business Unit**

***Description**

[Return to Case](#)

* Required Field

Note: Only PeopleSoft Support or Service Center for Higher Education users can create orders. This functionality is not available in PeopleSoft HelpDesk applications.

Field or Control	Description
Business Unit	Select an order business unit for the order that you're creating. Business units are limited to those using the same customer setID as the case.
Description	Enter a description for the new order.
Create Order	Click to create the order.

Related Links

“Understanding Order Capture” (PeopleSoft Order Capture Applications)

Return Material Authorization Page

Use the Return Material Authorization page (RC_RMA_HDR) to create an RMA and relate it to the current case.

Navigation:

- In the Actions section on the Case page, select *Create RMA* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Create RMA* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Create RMA* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Return Material Authorization page.

Returns

Save | Search | Add RMA | Next | Previous | 360-Degree View | 360-Degree Search | >> Personalize

RMA Number 100300010 **Case ID** 220426
Unit APP01 - Appliances

Return Material Authorization | Notes

Contact Information

*Case ID 220426 Contact Jim Jacobs
 Phone 988-5600(650) Email jimjacobsdch@yahoo.com

Return Product Information Find First 1 of 1 Last

*Return to IBU Appliances *Return Date 02/19/2006
 *RMA Line Type Advanced Exchange *Problem Code Item Defective
 Site 1200 Lake Dr Circlepine MN USA *Address 1200 Lake Dr Circlepine MN USA
 Serial ID SR1004-3001 Lot ID
 Product ID SR1004
 *Item ID SR1004
 *Qty Returned 1.0000
 Requester BLEE
 Comments

Replacement Item(s) Personalize Find View All First 1 of 1 Last

Replacement Item ID	Replacement Item Name	Quantity Requested	UOM
SR1004	18000 BTU Room Air (Grey)	1.0000	EA

Go to: View Status Requisition Workbench

Note: Only PeopleSoft Support users or Service Center for Higher Education can create RMAs. This functionality is not available in PeopleSoft HelpDesk applications.

Related Links

[Understanding Material Return Processing](#)

Create Service Order Page

Use the Create Service Order page (RC_LINK_RO_SEC) to create a service order and relate it to the current case.

Navigation:

- In the Actions section on the Case page, select *Service Order* from the Related Actions drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Service Order* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Service Order* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Create Service Order page.

Case

Create Service Order

Enter the Business Unit and Service ID for this order.

*Business Unit

CRMCO APPLIANCES

Select Agreement or Warranty

*Service ID

APP0000006

Service Description

Repair Air Conditioner

Create Service Order

[Cancel and Return to Case](#)

* Required Field

Note: Only PeopleSoft Support or Service Center for Higher Education users can create service orders; this functionality is not available in PeopleSoft HelpDesk applications.

Field or Control	Description
Business Unit	Select a business unit for the service order that you're creating. The default comes from the Service Order Unit field in the Call Center BU page.
Service ID	Select the service that is to be performed.
Create Service Order	Click to create the service order.

Related Links

“Understanding Service Orders” (PeopleSoft Integrated FieldService)

Change Requests Page

Use the Change Requests page (RC_CASE_CHANGE_SEC) to search for and identify a change request to relate to the case.

Navigation:

- In the Actions section on the Case page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Change Requests search page (1 of 2).

Change Requests

▼ Search

Use Saved Search

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

*Business Unit

=

IT Help Desk

Change Request ID

begins with

Change Summary

begins with

Requester Last Name

begins with

Requester First Name

begins with

Owner Last Name

begins with

Owner First Name

begins with

Status

=

Request Type

=

Sub Type

=

Priority

=

Medium

Category

=

Product Group

=

Product ID

=

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

This example illustrates the fields and controls on the Change Requests search page (2 of 2).

Change Requests

Customize | Find | View All | First 1-3 of 3 Last

Summary

Category

Change Request ID	Unit	Category	Priority	Type	Sub Type
400001	ITHDK	Major	Medium	Hardware	
400002	ITHDK	Minor	Medium	Hardware	
400003	ITHDK	Minor	Medium	Hardware	

Return

Note: Only PeopleSoft HelpDesk or Service Center for Higher Education users can relate change requests; this functionality is not available in PeopleSoft Support applications.

To relate an existing change request to a case, click one of the change requests that appears in the **Search Results** grid. The Change Request appears in the **Related Actions Summary** grid on the Case - Summary page and the Case - Related Actions page.

To add a new change request, click the **Add Change Request** button at the bottom of the page.

Change Request Page

Use the Change Request page (RG_CHANGE_REQUEST) to create change requests.

Navigation:

- In the Actions section on the Case page, select *Change Request - Create New* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Summary page, select *Change Request - Create New* from the **Related Actions** drop-down list box, then click the **Go** button.
- In the Related Actions section on the Related Actions page, select *Change Request - Create New* from the **Related Actions** drop-down list box, then click the **Go** button.

This example illustrates the fields and controls on the Change Request page (1 of 2).

This example illustrates the fields and controls on the Change Request page (2 of 2).

Note: Only PeopleSoft HelpDesk or Service Center for Higher Education users can create change requests. This functionality is not available for PeopleSoft Support users.

For instructions about using the pages in this component:

See [Understanding Change Request Management](#).

Identifying Interested Parties

The main people associated with a case are those who have the problem (customer contacts, consumers and their contact, employees and their alternate contacts) and the agent to whom the case is assigned.

Additionally, there may be many other people interested in the case and its progress, such as agents who are working on the case or a similar case, a customer's account manager and sales representative, and so on.

By adding people to the list of interested parties for the case, you facilitate communication with these people. When you send a notification from the case, the Outbound Notification page includes a check box that you can select to send the notification to the interested parties in addition to any other addressees.

Page Used to Identify Interested Parties

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Interested Parties Page	RC_INTEREST_PARTY	List the names of people who might want to receive information about this case.

Interested Parties Page

Use the Interested Parties page (RC_INTEREST_PARTY) to list the names of people who might want to receive information about this case.

Navigation:

- **Support > Search Cases > Case**

Click the **Add Interested Parties** button on the Summary page

- **HelpDesk > Search Cases > Case**

Select the **Add Interested Parties** button on the Summary page.

- **HR HelpDesk > Search Cases > Case**

Select the **Add Interested Parties** button on the Summary page.

- **Analyst Service Center > Search Cases > Case**

Select the **Add Interested Parties** button on the Summary page.

This example illustrates the fields and controls on the Interested Parties page.

Case

08/19/2009 8:01:01AM PDTMy Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> | Personalize

Case ID 220069

Status Open - Awaiting User

Customer Cady Montgomery

Contact Fred Albright

Summary The refrigerator Door is broken. Need to...

Contact Method 651/785-6687(2834)

Open Cases 2

Customer Value Gold ★★★★★

Notes (0) | Tasks (0) | Case History | Related Cases (0) | Related Actions (0) | Interested Parties (2)

Enter the Name in the following format: First Name Last Name

Interested Parties

Customize | Find | First 1-2 of 2 Last

*Name	*Reason	Date Added
Sabrina Redford	Call Center Manager	08/19/2009 8:03AM
Ted Powell	Account Representative	08/19/2009 8:03AM

Add Interested Parties

Save Case | Find Solutions | Escalate Case | Match Cases

Audit History

Field or Control	Description
Name	To be an interested party, a person must have a person record in the PeopleSoft CRM database. For the system to send notifications to the person, the person must have a user ID (for worklist notifications) or an email address (for email notifications).
Reason	The reason that the person is included as an interested party. Your organization defines values based on the business unit of the case. The reason codes shown here are those defined with the reason type <i>Reason Interested</i>.
Date Added	The date and time that the person was added as an interested party.

Recording Billing Information

The PeopleSoft system enables the PeopleSoft Support and vertical applications that are using PeopleSoft Support to bill for their services. Cases with an agreement can be billed through contracts. Cases with a warranty, or no agreement, are called on demand and sent to the contract interface table, and then to billing. The PeopleSoft Contracts system takes care of the billing and accounting rules.

The Billing page is delivered hidden. If you want to bill for cases, modify the template to enable the page and perform the setup for billing.

Note: This functionality is not available to PeopleSoft HelpDesk, HelpDesk for Human Resources, or Analyst Service Center. You can control access to the billing page using regular role based security. Only the manager role has access; agents do not have access

See “Understanding PeopleSoft CRM Integration with the Transaction Billing Processor” (PeopleSoft Services Foundation).

Page Used to Record Billing Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Billing Page</u>	RC_CASE_BI	Manage billing information for a case.

Billing Page

Use the Billing page (RC_CASE_BI) to manage billing information for a case.

Navigation:

Support > Search Cases > Case > Billing

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

Case 08/19/2009 8:07:21AM PDT My Time Zone

Save | Print | Spell Check | 360-Degree View | 360-Degree Search | >> Personalize

Case ID 273 **Status** Open - New Case
Customer Cady Montgomery **Contact** Fred Albright
Summary Refrigerator condensor needs to be clean... **Contact Method** 651/785-6687(2834)
Open Cases 2 **Customer Value** Gold ★★★★★

Tasks (0) | Case History | Related Cases (0) | Related Actions (0) | Interested Parties (0) | **Billing**

Billing Information

Bill To Customer Cady Montgomery
Bill To Contact Fred Albright
Bill To Address 5575 White Tail Lane, Colorado
Billing Currency USD US Dollar

Payment Information

Purchase Order
☒ **Invoice** **Payment Terms** NET30
☐ **Credit Card** [Credit Card Information](#)
[Tax Parameters](#)

Billing Details

Currency Code USD **Billing Status** Pending

Fee	Price	+/-	Adjustment	Type	Adjust Amount	Reason	Total Price
Case Fee	0.00000	+	80.00000	Amount	80.00000	Other	80.00000
Grand Total							80.00000

Recalculate Totals | Clear Adjustments

This page serves multiple purposes. It enables a user with a manager role to view billing information, purchase order numbers, and authorize credit card information for the service that is performed at the customer site. It also enables users to view subtotals for fees by case or by time, apply adjustments to transaction fees, recalculate totals, and view the billable amount in the customer's currency.

Billing Information

The system populates this group box with information from the bill to customer on the case.

Field or Control	Description
Bill to Customer	Select the customer that should be billed for the case.
Bill To Contact	Select the contact that should be billed for the case.
Bill To Address	Select the customer address to which the bill should be sent.
Bill Currency	Select the currency that the customer is using for the transaction. The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice.

Payment Information

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 billing cycle for the invoice (for example, <i>NET30 - Due in 30 days</i>). 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.

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. The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page. Note: You can integrate credit card information with Cybersource, a third-party taxware vendor.
Tax Parameters	Click to access the Tax Parameters page, where you indicate whether the customer is exempt from taxes. If the customer is tax exempt, enter the exemption certificate number and tax code that the customer supplies to you. The system uses a default tax code based on the customer's address, but you can override it by choosing another value.

Billing Details

A case can be billed by case (flat fee) or time. Billing applies to either on demand cases or agreement cases. When a case is created with an agreement, and pricing is enabled from the installation options component, the case is billed based on the transaction fee defined in that agreement line.

The transaction fee can be either a flat fee or time based. When a case is created without an agreement, the on-demand case fee is applied. Based on business unit setup (whether the on-demand case is billed by time or by case), it retrieves pricing information from the pricing setup for either case-based or time-based billing.

When a case is billed by case, only a flat fee is applied. When a case is billed by time, it is billed based on the total billable hours worked on that case, multiplied by the hourly rate. Once the case is billed, you cannot enter any more billable hours.

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system then calculates the sum of all lines, including those that have changed, and provides the recalculated amount in the **Total Amount** field.

Field or Control	Description
+/-	Select the plus sign (+) to indicate a positive adjustment to the price or the minus sign (–) to indicate a negative adjustment to the price.
Adjustment	Enter either a currency amount or a percentage value.

Field or Control	Description
Type	Select <i>Percent</i> or <i>Amount</i> .
Reason	Select the reason for the adjustment. These values are user-definable on the Reason Code setup page. The PeopleSoft system delivers this feature without any valid values.
Other	If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page, where you can enter a unique description of the reason.
Recalculate Totals	Click this button any time there is a change to the Billing Details grid that affects the price or the currency code. The system recalculates the total cost of the fees.
Clear Adjustments	Click this button to clear the adjustments that were made and return to the original total amounts.

Entering Attribute Information

Attributes enable you to extend the information stored for a case without modifying that case's base table. This capability is valuable when you want to capture additional information about a case that is not available.

For example, you might need to capture the color and size attributes for certain types of products but not for all products. Because these attributes are relevant only for some products, you do not want to add them as fields to the base table itself.

Page Used to Enter Attribute Information

Page Name	Definition Name	Usage
Attributes Page	RC_ATTR_CASE	Add user-defined information to the case.

Related Links

“Understanding Attributes” (Automation and Configuration Tools)

Attributes Page

Use the Attributes page (RC_ATTR_CASE) to add user-defined information to the case.

Navigation:

- **Support > Search Cases > Case > Attributes**
- **HelpDesk > Search Cases > Case > Attributes**
- **HR HelpDesk > Search Cases > Case > Attributes**
- **Analyst Service Center > Search Cases > Case > Attributes**

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

Case 08/19/2009 8:30:23AM PDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 273 **Status** Open - New Case
Customer Cady Montgomery **Contact** Fred Albright
Summary Refrigerator condensor needs to be clean... **Contact Method** 651/785-6687(2834)
Open Cases 2 **Customer Value** Gold ★★★★★

Tasks (0) Case History Related Cases (0) Related Actions (0) Interested Parties (0) **Attributes (2)**

Complaint

Nature of Complaint

Complaint Details

Save Case Find Solutions Escalate Case Match Cases

Audit History

Select or enter the information that you want to add to the case.

See “Understanding Attributes” (Automation and Configuration Tools).

Selecting, Printing, and Emailing Case Information

This topic provides an overview of print case functionality and discusses how to select, print, and email case information.

Pages Used to Select, Print, and Email Case Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Case - Display Options Page</u>	RC_PRINT_OPTIONS	Change print options.
<u>Print Case Page</u>	RC_CASE_PRINT_VIEW	Print and email case information.

Understanding the Print Case Functionality

Because certain case data can be considered proprietary information, the PeopleSoft system provides the ability to select or deselect certain fields to display or not display on the Print Case page and in the email attachment.

When the user initiates an email action, the system prepares the attachment behind the scenes and automatically sends it to the attachment server without user intervention. The system formats the attachment to display in an arrangement and style that is very similar to the Print Case output.

The system saves the attachment, which is in HTML format, with a unique filename on the attachment server associated with correspondence management. The filename that is displayed to the user on the email page is *Case NNNN Details*.

Case - Display Options Page

Use the Case - Display Options page (RC_PRINT_OPTIONS) to change print options.

Navigation:

Click the **Change Display Options** link on the Print Case page.

This example illustrates the fields and controls on the Case - Display Options page.

Clear or select the check boxes and radio buttons associated with the information that you want to print or email. Click **OK**. The system returns you to the Print Case page.

You can only print or email the sections that are listed on the Case - Display Options page. While the following sections are part of the Case component, the PeopleSoft system does not include these sections on the Case - Display Options page and you, therefore, cannot print or email this information using the print case functionality that the PeopleSoft system delivers:

- Related Cases
- Interested Parties
- Attributes

- Case History
- Billing

Print Case Page

Use the Print Case page (RC_CASE_PRINT_VIEW) to print and email case information.

Navigation:

Click the **Print** button from the case toolbar.

This example illustrates the fields and controls on the Print Case page (1 of 2).

Case ID 220491		Status	Open - New Case
		Change Display Options	Email
Customer Information			
Name	Gregory Keith		Alternate Contact
Site		Contact Method	HCMGENUser1@ap6023fems.us.o
ID	ADCRM1000		racle.com
Employee Number	Department		
Location			
Physical Location			
Reported By	Gregory Keith		
Problem Information			
Summary	How can I obtain a replacement Campus ID card?		
Description	because original was lost, stolen, or damaged		
Case Information			
☐ Global Case	Category Residential Life		
☐ Secured Case	Priority Low		
Business Unit Great Lake University	Impact		
Case Type Student Services	Urgency		
Status Open - New Case	Severity		
☐ Resolved by First Contact	Source		
Provider Group Residential Life	Agreement		
Assigned To Amanda Newman	Agreement Details		
Product Group	Response Met Not Applicable		
Product ID	Restore Met Not Applicable		
Description	Entitled Response		
Problem Type	Actual Response		
Serial Number	Entitled Restore		
Asset Tag	Actual Restore		
Installed No			

This example illustrates the fields and controls on the Print Case page (2 of 2).

Notes				
Added	02/10/2009 5:39PM	Burt Lee		
Subject	Replace ID Card			
Details	Student needed replacement ID card because original was lost, stolen, or damaged			
Note Type				

Tasks				
There are no Tasks for this Case.				

Attempted Solutions				
ID	Description	Date Modified	Added By	Status
301404	Campus ID cards are needed to access campus residences as well as use dining services. You must purchase a replacement ID card on the lower level of the Student Center building. You will need to bring a picture ID such as a State Drivers License or State ID card.	02/10/2009 5:39:38PM PST	Burt Lee	Successful Resolution

Related Actions				
No related actions have been added.				

Audit History				
Created	02/10/2009 5:39PM PST	By	SAMPLE	Burt Lee
Modified	02/10/2009 5:39PM PST	By	SAMPLE	Burt Lee
Closed		By		

To print case information, click **File > Print > Print** from the toolbar on your browser page.

To email case information, click the **Email** button at either the top or the bottom of the page. The system displays the Outbound Notification page. Any attachments associated with the case will be available on the Outbound Notification page for inclusion with the email.

See “Sending Manual Notifications From CRM Transactions” (Automation and Configuration Tools).

Tracking Time Spent on Cases

Understanding Time Logs

In PeopleSoft CRM, a time log is automatically generated for every case created in the system. A case time log is prepopulated with the case's assigned agent name and its start date and time.

Time logs are stored in the PeopleSoft database for informational purposes. The time log is referenced in agreement pricing for cases where there is a prepaid agreement for a specified number of hours: the time log is used to decrement the number of remaining hours in the prepaid agreement.

You can design your own reports and processes to leverage the time data captured for each case. PeopleSoft Support and HelpDesk deliver a report that shows the average time that each support or help desk agent spent to close a case.

Note: If you log time for a task that spans multiple days, it is highly recommended that you enter time reports for each work day (that is, start and end dates are identical), which enables the system to record the exact number of work hours per work day for reporting.

For example, you want to log time for a service activity that you just finished and it lasted three days, from 4 p.m. on June 6 through 10 a.m. on June 8. If you enter the entire period of time in one time-log entry, the system includes the nonwork hours during this time period when it calculates the total number of hours you spent on this task.

In this scenario, June 7 becomes a 24-hour work day even though you actually worked eight hours on that day. To make sure the system captures work hours accurately, log time for each work day that you spend on the task by adding rows to the task's time log.

Related Links

[PeopleSoft CRM Call Center Reports: A to Z](#)

Managing Time

This topic discusses how to log time that is spent working on cases.

Page Used to Manage Time

Page Name	Definition Name	Usage
<u>Manage Time Page</u>	RF_TIME	Log the actual period of time spent to complete a case. Time entry links can appear under the Support or HelpDesk folder, depending on who is logged in. For example, a help desk agent will see Time under HelpDesk folder.

Manage Time Page

Use the Manage Time page (RF_TIME) to log the actual period of time spent to complete a case.

Time entry links can appear under the Support or HelpDesk folder, depending on who is logged in. For example, a help desk agent will see Time under HelpDesk folder.

Navigation:

- **Support > Log Time > Manage Time > Manage Time**
- **HelpDesk > Log Case Time > Manage Time > Manage Time**
- Click the **Time Entry** button on the toolbar of the Case component of PeopleSoft Support, HelpDesk or HelpDesk for Human Resources.

This example illustrates the fields and controls on the Manage Time page.

Manage Time

Save Refresh | Search | Next | Previous | 360 360-Degree View | >> Personalize

Case ID 220500 Employee Savana Miller
Contact

Time Customize Find | 1-2 of 2 Last

Time Entry Comments

Agent	Start Date	Start Time	End Date	End Time	Duration
Amanda Newman	08/19/2009	9:30AM	08/19/2009	10:50AM	1 hour 20 min.
Amanda Newman	08/20/2009	11:30AM	08/20/2009	12:00PM	30 min.

Add Time

Total 1 hour 50 min.

Each case is associated with only one system generated time log (each with a unique time report ID). While you cannot manually create time logs, you can, however, add rows within an existing time log. It is useful if a task spans multiple days and you want to report work time on a daily basis.

Field or Control	Description
Agent	Select the worker who spent the time performing the work on the case. For a case time log, the system populates this field with the name of the agent assigned to the case (if available).
Start Date and Start Time	Enter the date and time that the work began on the case. The system uses the information in the end date and time fields to calculate duration on the Summary page
End Date and End Time	Enter the date and time that the work ended on the case.
Duration	Displays the amount of time the agent entered for that specific row.
Add Time	Click to add a new row that you can use to enter additional time.
Return to Case	Click to return to the associated case

Comments

Enter any comments related to the time that you entered.

Related Links

[Understanding Case Management](#)

“Understanding the Configurable Toolbar” (Automation and Configuration Tools)

Managing Credit Card Payments

Understanding Credit Card Processing

If your organization accepts credit cards in payment for support, you can use the Authorize Credit Card page to manage this process. This page is not available when the case is associated with an agreement where this form of payment (pay for service) is inapplicable.

See [Integration Interfaces](#)

This topic discusses:

- Processing options.
- Credit card transactions.
- Transaction process flow.

Note: Credit card processing is relevant to PeopleSoft Support only; PeopleSoft HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education do not incorporate credit card functionality.

Processing Options

Credit card processing depends on whether you use a third-party credit card authorization and payment vendor.

If you entered a merchant ID on the setup page, these conditions occur:

- The Authorize Credit Card page contains a **Submit** button that agents use to submit transactions.
- The Authorize Credit Card page requires you to enter information that your third-party credit card authorization and payment vendor requires.

If you did not enter the merchant ID, there are no required fields on the Authorize Credit Card page. This page does not have a **Submit** button. Instead, the page captures information for use with your organization's own solution for processing credit card payments.

Credit Card Transactions

PeopleSoft Support facilitates credit card processing through integration with third-party credit card authorization and payment vendors.

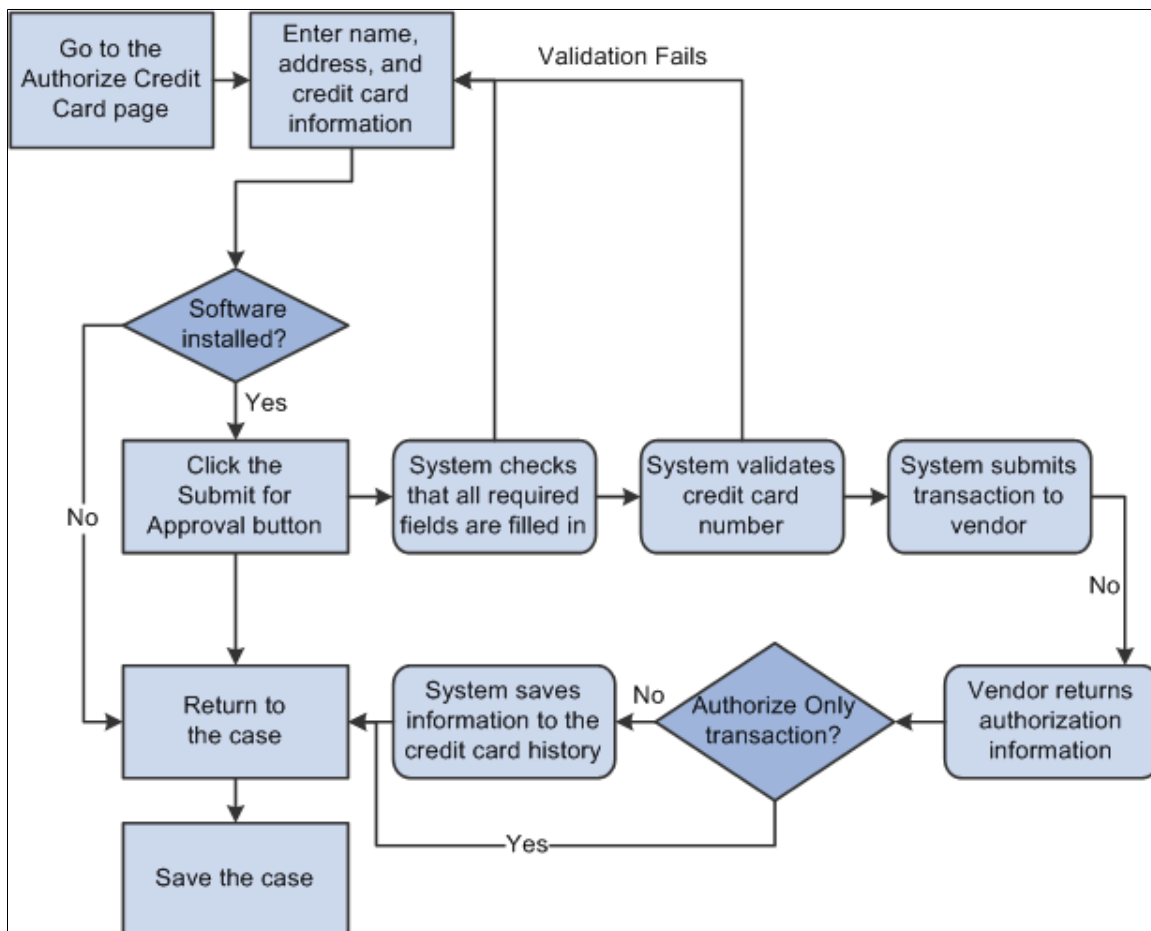
Depending on how your organization has configured your credit card processing, some or all of these transaction options are available:

Transaction Option	Processing
Authorize Only	Verifies that the card is valid for the charge (the customer has enough credit to pay for the order, the card is not stolen, and so on). The vendor does <i>not</i> bill the credit card.
Bill Only	Bills the card without first verifying that the card is valid for the charge. Select this option if you have preauthorized the transaction and you want to submit the transaction for billing only.
Authorize and Bill	Performs both authorization and billing. The vendor charges the customer's credit card upon receiving authorization.
Credit Only	Credits the customer's credit card.

Transaction Process Flow

The system performs all credit card validation before submitting data to the vendor, which prevents unnecessary transaction charges.

This diagram illustrates the credit card transaction process flow.



When the system validates a credit card number, it validates that:

- The credit card number is the correct length.
- The credit card number starts with a valid prefix.
- The credit card number is valid (if the Credit Card Setup page specifies the use of a check digit algorithm).

The system saves the authorization information along with the other transaction information in the credit card history once you manually save the case. This ensures that you have records of any real-time billing or credit transactions.

Processing Credit Cards and Reviewing Transactions

This topic discusses how to process credit cards and review transactions.

Pages Used to Process Credit Cards and Review Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Credit Card Information Page</u>	RC_CASE_CARD_SEC	Submit a customer's credit card information for authorization.
Credit Card Information - Transaction Results Page	RC_CASE_CARD_SEC	Review transaction results.
<u>Review Electronic Card History Page</u>	RB_CARD_HISTORY	Review credit card transactions that have been submitted for authorization.
<u>Review Electronic Card History Page</u>	RB_CARD_ADDR	Review the address information that was used to process the credit card transaction.

Credit Card Information Page

Use the Credit Card Information page (RC_CASE_CARD_SEC) to submit a customer's credit card information for authorization.

Navigation:

Support > Add Case > Case

Click the **Credit Card Information** link on the Billing page. Or click **Credit Authorization** link from Case page [if enabled on display template]

This example illustrates the fields and controls on the Credit Card Information page.

Credit Card Details

Credit Card Information

☐ Credit Card on File

Credit Card [Edit](#) *Phone

Verification Number *Email Address

☒ New Credit Card

*Card Type

*Card Number

*Expires

*First Name

*Last Name

Name on Card

Verification Number

*Email Address

*Phone

 ☐ Save on File [Enter New Address](#) [Edit](#)

*Address

Transaction Details

*Amount *Currency 

Transaction Type

[Return to Case](#)

This page is also used in the Service Order and Agreement components for credit card authorization purposes.

Note: For security purposes, the credit card number and the verification number are encrypted and stored in the database. After save, only the last 4 digits of the credit card number is shown. As for the verification number, it is masked with XXX, and will be removed permanently from the database after the credit card authorization process completes.

Credit Card Information

This group box displays fields that are generally required by third-party credit card software vendors. All fields are required.

<i>Field or Control</i>	<i>Description</i>
Credit Card on File and Credit Card	Select this option if the customer or consumer has a credit card on file. Then select the card that you want to use from the Credit Card drop-down list box.
Phone	Enter the customer's phone number.
Email Address	Enter the customer's email address.
New Credit Card	Select this option if the customer is using a new credit card.

Field or Control	Description
Save on File	Select the check box if you want to save the person's credit card information.
First Name, Last Name and Name on Card	Enter this information for the credit card holder. The default name is the name of the consumer or contact who is associated with the case. Change the value if this is not the name on the credit card. Credit card information stored in a person's record (for example, information entered in the Consumer or Contact component) does not appear by default on this page. If, after submitting a credit card charge, you return to this page to authorize additional charges, the information that you previously entered is saved, but the credit card number is masked so that you see only the last four digits. The information is preserved for the current case only. If the same person pays for another case, you must reenter all of the information.
Card Type	Select a credit card type. Values are based on the credit cards that are designated <i>Active</i> on the Credit Card Setup page and may include <i>AMEX</i> , <i>Diners Club/Carte Blanche</i> , <i>Discover</i> , <i>PrimaryCard</i> , and <i>Visa</i> .
Card Number	Enter the number of the credit card that is to be charged for the transaction.
Expires	Select the credit card expiration date (2-digit month and 4-digit year). Note: The <i>Expires</i> field (CR_CARD_EXPYR) contains translate values for valid expiration years. You must periodically review and update this field with valid expiration year values. PeopleSoft CRM delivers values that range from 2001 to 2014.

Field or Control	Description
Verification Number	Enter the verification code of the credit card. This field becomes required if the Credit Card Verification Number Required option is selected on the General Options page. After the credit card transaction is submitted and the authorization process is completed (passed or failed), the verification number will be deleted permanently from the system in compliance with the Payment Card Industry (PCI) Security Standards Council recommendations on sensitive data storage.
Email Address and Phone	Displays the customer's primary email address and telephone number by default.
Address	Displays the primary address that the system has on file for the person for whom you are executing a credit card transaction. Other addresses that are associated with that person are also available for selection. Confirm that the address is the billing address for the credit card, because address verification is part of the authorization process. The address format is based on the country that you enter. Click the Enter New Address link if you want to add a new address to be used in the transaction. Click the Edit link if you want to update the currently selected address.

Transaction Details

The options that are available depend on how your organization has configured credit card processing.

Field or Control	Description
Amount	Enter the amount that is to be authorized.
Currency Code	Select the currency in which the credit card transaction should be calculated.

Field or Control	Description
Transaction Type	Select one of these values: <i>Authorize Only:</i> Select to submit the transaction for authorization only. The vendor verifies that the card is valid for the charge and does not bill the credit card. <i>Authorize and Bill:</i> Select to submit the transaction for authorization and billing. The vendor performs both authorization, and if the charge is authorized, the vendor charges the customer's credit card. <i>Bill Only:</i> Select if you have preauthorized the transaction and you want to submit the transaction for billing only. The vendor bills the card without verifying that the card is valid for the charge. <i>Credit Only:</i> Select to submit a credit transaction. The vendor credits the customer's credit card.
Submit Transaction	Click to validate all of the data on the page. If the system finds missing or invalid data, the system displays an error message explaining the problem. You must correct all of the errors before the approval process can be initiated. If all validation criteria are met, clicking this button calls the business interlink. The vendor then performs the authorization, billing, and credit processing that you requested. Warning! When you submit an authorize and bill, bill only, or credit only transaction, the system saves the transaction information after the vendor returns the information. When you submit an authorize only transaction, you must save your work manually by saving the Case page. If you fail to save, the case results in an incomplete credit card transaction and you will have no record of the completed transaction in your system.

Credit Card Information - Transaction Results

Access the Credit Card Information - Transaction Results page (click the **Submit Transaction** button on the Credit Card Information page).

This example illustrates the fields and controls on the Credit Card Information - Transaction Results page.

Case

Transaction Results

Transaction	
Status Authorized	Code 123456
Date 09/03/2009	Reference 2125198115
Request ID 2520001063370008402433	

[Return to Credit Card Details](#)

This page displays authorization information for the credit card transaction.

Field or Control	Description
Status	These statuses are examples and may not be suitable for all vendors: <i>Unprocessed/Retry:</i> Transaction has not been processed or is a failed credit card process and is being resubmitted. <i>Authorized:</i> Transaction is approved. The funds are reserved for the transaction. <i>Credited:</i> A credit has been authorized and processed for the transaction. The funds are credited back to the specified credit card. <i>Denied:</i> Transaction has failed credit card processing and has been declined or disallowed by the company issuing the credit card. <i>Billed:</i> Transaction is complete. Funds are charged to the credit card. Billed transactions must be preceded by an authorization. <i>Authorized and Billed:</i> Signifies successful output from the background settlement process. <i>Manually Approved/Settled:</i> Transaction is approved. Someone contacted the credit card service to obtain verbal approval. <i>Change to Terms:</i> Payment type has been changed from credit card to payment terms. <i>Cancel Order:</i> Transaction is cancelled and is not subject to further processing. <i>Processing:</i> Transaction has been submitted for approval and is awaiting results.
Code (credit card authorization code)	Displays the reference number for an authorized transaction.
Date	Displays the date that the transaction was authorized.
Reference	Displays a message regarding the authorization. For example, if a link is not working, you might see <i>Interlink Error</i> .

Field or Control	Description
Return to Credit Card Details	Click to return to the Credit Card Information page. If you return to the case without submitting the transaction, the information still appears on the Credit Card Information page and is saved to the credit card history when you save the case, even though the transaction results fields are blank. To prevent this from happening, you can either clear all data from the Authorize Credit Card page before returning to the case or close the case without saving.

Related Links

[Recording Billing Information](#)

“Understanding Credit Card Encryption” (Application Fundamentals)

Review Electronic Card History Page

Use the Review Electronic Card History page (RB_CARD_HISTORY) to review credit card transactions that have been submitted for authorization.

Navigation:

Review Electronic Card History > Electronic Card History

This example illustrates the fields and controls on the Review Electronic Card History page (1 of 2).

Review Electronic Card History

Card Information

Card Owner ID Call Center
Application ID PEOPLESOF2

Card History

Find | View All | First 2 of 2 Last

Sequence Number 2
Authorization Status Authorized
Authorization Date 09/03/2009
Authorization Code 123456
Credit Card Request ID 2520001063370008402433
Transaction Reference Number 2125198115
Name as it Appears Gabrielle Sanchez
Credit Card Number *****1111
Expiry Month / Year 04 / 2011 **Verification Number Sent?** Y
Amount \$100.000 **Currency** USD

This example illustrates the fields and controls on the Review Electronic Card History page (2 of 2).

Phone Number	408/998-7146
Email ID	gsanchez@healthcon.com
Return Message Status	
Message 1	SUCCESS
Message 2	
Message 3	
Address Verification Service	Contact Address
Authorization Date/Time	2009-09-03-10.48.27.
Modified	09/03/2009 10:48AM PDT VP1

Many fields on this page are the same as for the Authorize Credit Card page. Only definitions for fields that do not correspond to similarly named fields on the Authorize Credit Card page are described here.

Card Information

<i>Field or Control</i>	<i>Description</i>
Card Owner ID	Displays the name of the application through which the credit card transaction was processed. PeopleSoft CRM groups credit card transactions by the application from which they originated. Use the Show previous row and Show next row buttons to scroll through the transactions for a specific PeopleSoft CRM application.

Card History

<i>Field or Control</i>	<i>Description</i>
Sequence Number	If multiple credit card transactions are associated with a case, the sequence number differentiates the transactions.
Verification Number Sent	Indicates if a credit card verification number was sent for this credit card transaction. The number is not displayed on this page.
Return Message Status, Message 1, Message 2, and Message 3	Displays information regarding your authorization, billing, or credit request.
Address Verification Service	Displays address verification results. An example is <i>Exact Address Match</i> .

Field or Control	Description
Contact Address	Click to access the Address Secondary page, where you can review the address information used to process the credit card transaction.

View Contact Address Detail Page

Use the View Contact Address Detail page (RB_CARD_ADDR) to review the address information that was used to process the credit card transaction.

Navigation:

Click the **Contact Address** link on the Review Electronic Card History page.

This example illustrates the fields and controls on the View Contact Address Detail page.

View Contact Address Detail

Contact Address

Country United States

Address 1

Address 2

Address 3

City

County **Postal**

State North Dakota

Use this page to review the address information used to process the credit card transaction. Click **Return** to go back to the Review Electronic Card History page.

Managing Material Returns

Understanding Material Return Processing

If you integrate PeopleSoft Support with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, call center agents can generate RMAs for customers returning stock for replacement, repair, or stock that was shipped in error.

This topic discusses:

- RMA process flows.
- RMA notifications.

We discuss this information in the documentation for understanding requisitions and understanding purchase orders.

See *PeopleSoft FSCM: Purchasing*

Note: This chapter is relevant to PeopleSoft Support only; PeopleSoft HelpDesk applications do not incorporate RMA functionality.

RMA Process Flows

Agents using PeopleSoft Support can create four types of RMAs:

- Advanced exchange
- Return-and-replace
- Repair-and-return
- Return-to-stock

Basic RMA Processing

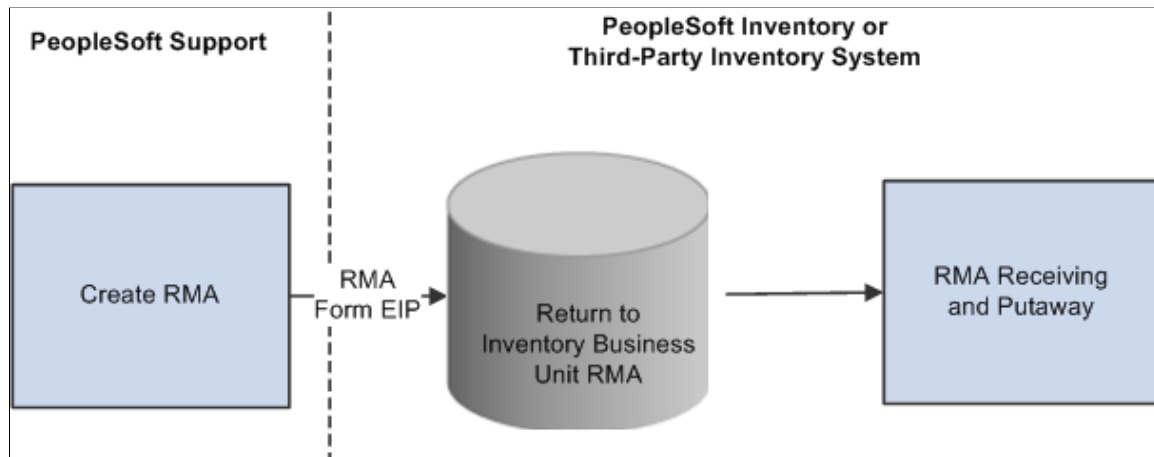
Regardless of RMA type, some processing steps are shared by all RMAs that are created in PeopleSoft Support:

1. A customer calls the agent and requests an RMA.
2. The agent opens a new or existing case for the customer and creates an RMA in PeopleSoft Support.
3. When the agent saves the RMA, the system uses the Return Material Authorization EIP (referred to as RMA Form EIP in the diagram) to stage the RMA for processing in the inventory business unit that has been defined on the RMA as the location to send the returned material.
4. The customer physically returns the material to the inventory business unit.

5. In PeopleSoft Inventory, or your third-party inventory system, receipt of the returned material is recorded and the RMA is closed in the inventory system.

Your inventory system handles the receipt status management for RMAs.

This diagram illustrates the basic RMA processing flow from PeopleSoft Support through PeopleSoft Inventory or a third-party inventory system.



We discuss this information in more detail in the Financials/Supply Chain Management documentation for defining general options.

See *PeopleSoft FSCM: Application Fundamentals*

Advanced Exchange RMAs

With the advanced exchange RMA type, you can create a replacement order for the customer at the time that you create the RMA. Specify the replacement item or items on the RMA line.

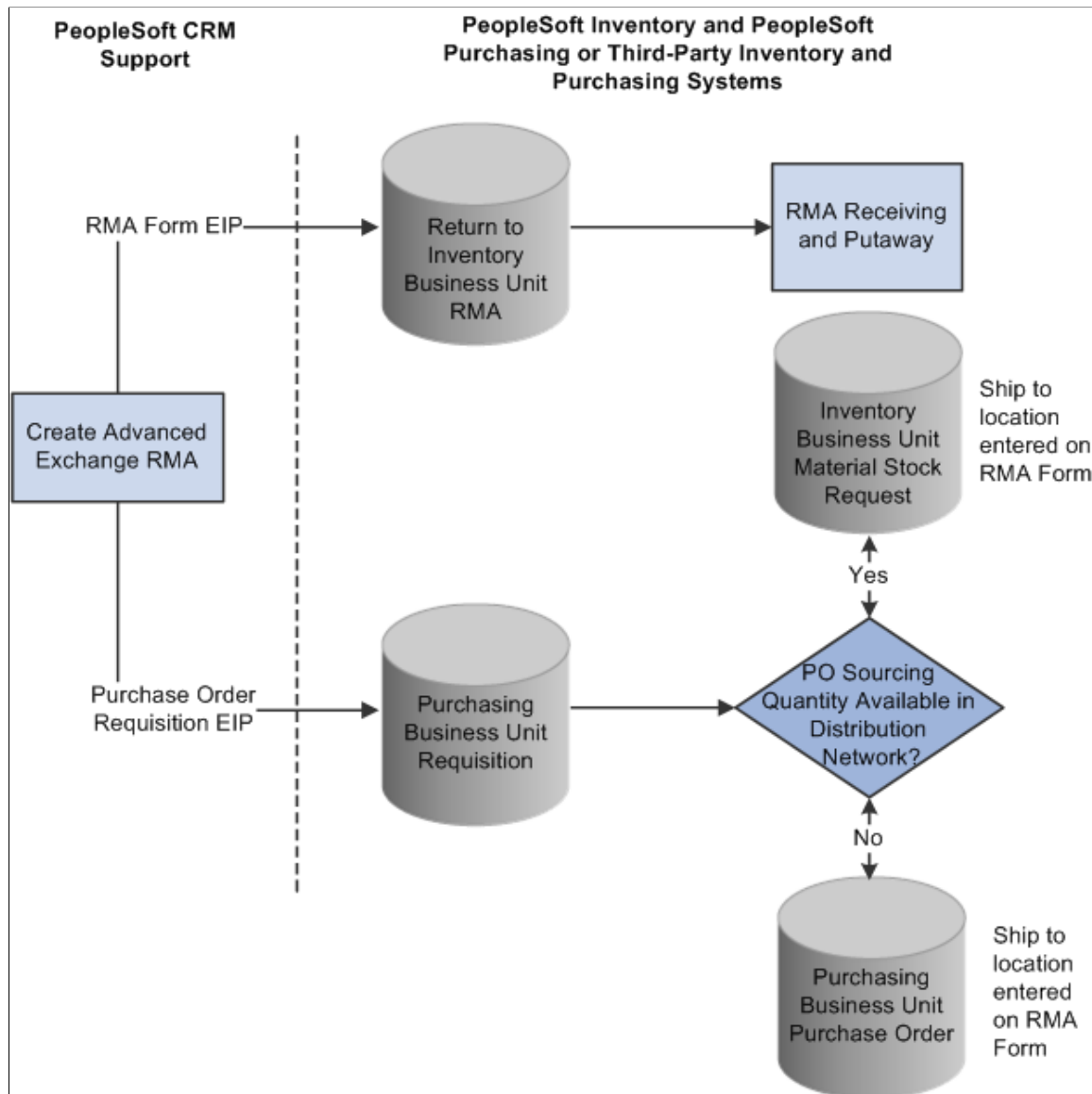
The replacement order can include any of the active items in your system. When you save the RMA form, the system stages the RMA in your inventory system using the Return Material Authorization EIP and creates a requisition request for the replacement order in your purchasing system using the Purchase Order Requisition EIP (referred to as PO Requisition EIP in the diagram).

The system obtains the ship to address for the customer's replacement order from the RMA form.

We discuss this information in more detail in the documentation for enterprise integration points, understanding the EIP catalog.

See *PeopleTools: Integration Broker Service Operations Monitor* and *PeopleTools: Integration Broker Testing Utilities and Tools*.

This diagram illustrates the advanced exchange RMA processing flow.



The Purchase Order Requisition EIP enables you to requisition a replacement for the customer at the time that the advanced exchange RMA is created.

Note: PeopleSoft Purchasing, or your third-party purchasing system, handles the processing of the requisitions that are staged by the Purchase Order Requisition EIP. In your purchasing system, you must set processing defaults for the staged requisitions and perform any required actions to complete the ordering process.

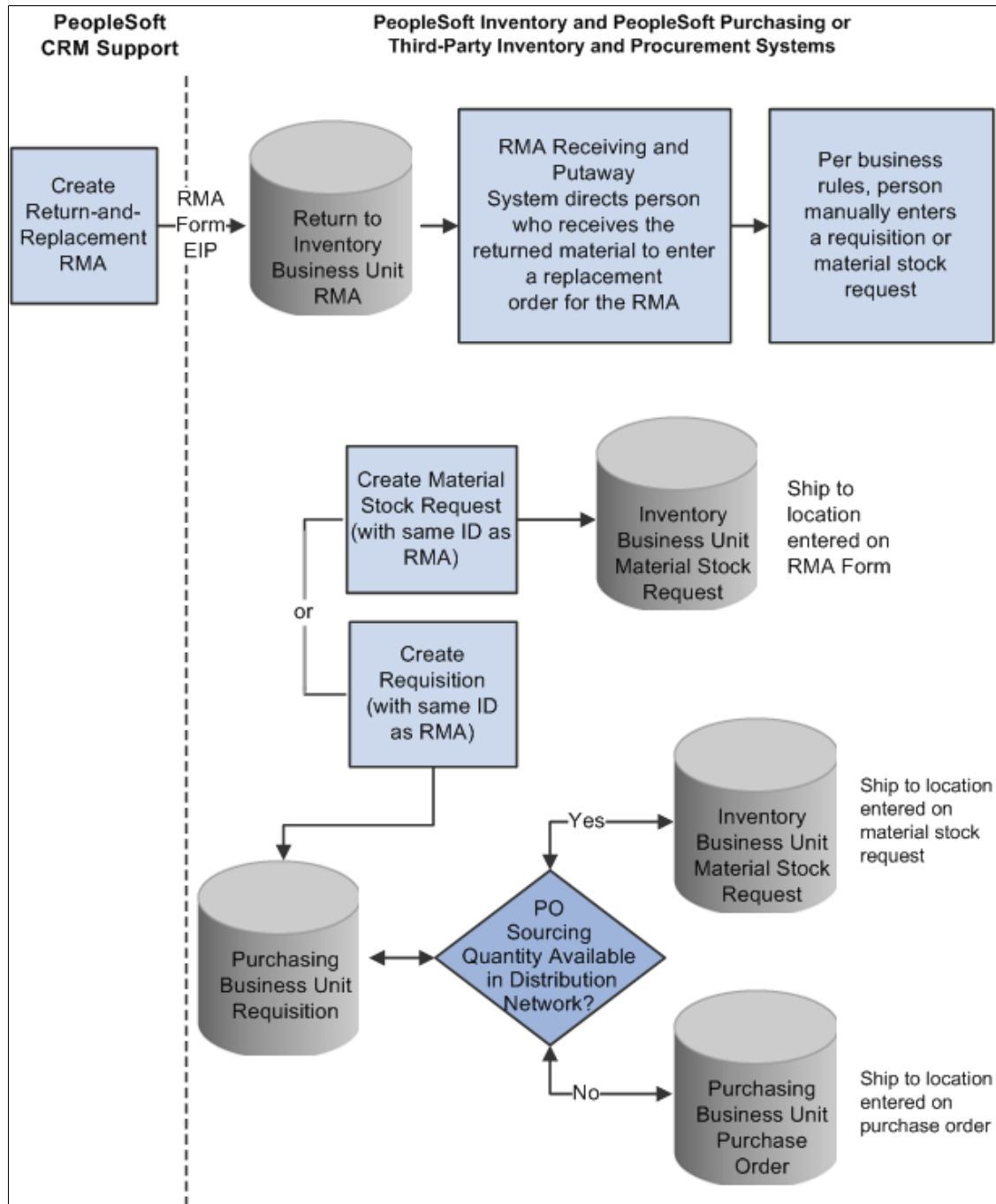
Return-and-Replace RMAs

Unlike the advanced exchange RMA, orders for return-and-replace RMAs are not created until the returned material has been physically received in the location specified as the return-to business unit. Follow these steps to process a return-and-replace RMA:

1. When a person records receipt of material on a return-and-replace RMA in your inventory system, the inventory system displays a message indicating that a replacement order is required.

2. Depending on your business process rules, the person manually enters a material stock request in your inventory system or a requisition in your purchasing system to replace the customer's returned material.
3. The person receiving the returned material uses the information on the RMA, such as the customer's address, information about the item, and quantity returned, to create the replacement order.
4. To facilitate tracking of the replacement order in your inventory or purchasing systems, the same ID as the RMA should be used when the person manually creates replacement requisitions or material stock requests.

This diagram illustrates the return-and-replace RMA processing flow.



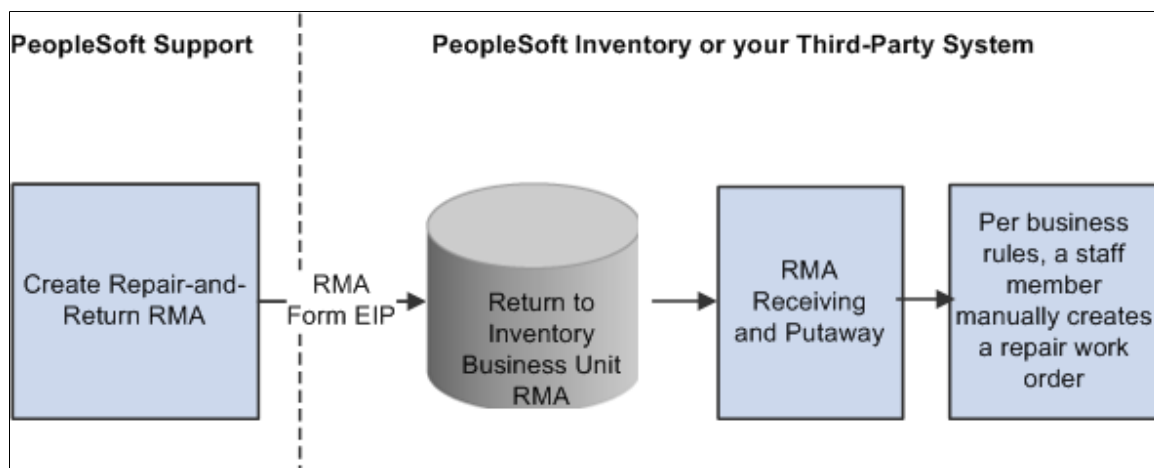
For return-and-replace RMAs, replacement orders are manually created in your inventory or purchasing systems after the returned material has been physically received from the customer.

Repair-and-Return RMAs

You create repair-and-return RMAs when a customer sends an item back to you for repair. As delivered, PeopleSoft CRM does not offer repair depot functions. However, if your business includes repair services, you can use the repair-and-return RMA option in conjunction with your business process rules. The repair-and-return RMA processing is similar to return-and-replace RMA processing:

1. A person creates an RMA for a customer in the specified return-to business unit in your inventory system.
2. A staff member, in the facility where the item needing repairs is sent, records the receipt of the RMA in your inventory system.
3. The staff member creates a work order for the repairs, according to your business rules, and delivers the item to the appropriate staff for repair work.
4. The work order should include the ship to address for the customer who appears on the RMA form and the RMA number (to facilitate RMA tracking across your enterprise).
5. The material is shipped back to the customer using the address information from the RMA when the repair work is complete.

This diagram illustrates the repair-and-return RMA processing flow.



For repair-and-return RMAs, repair work orders are manually created per your business rules when the returned material is physically received from the customer.

Return-to-Stock RMAs

You create a return-to-stock RMA for a customer who is returning material with no need for a replacement. Typically, the customer has received the wrong shipment or been shipped too much quantity. The process flow for a return-to-stock RMA is identical to the basic RMA processing flow.

We discuss this information in more detail in the documentation for receiving and putting away stock and transferring stock between business units.

See *PeopleSoft FSCM: Inventory*

Note: You can create RMAs for customers who return stock for orders that they placed but then changed their minds about the order at the time of receipt. For billing purposes, use the RMA processes of your order management system to handle these cases.

RMA Notifications

As delivered, PeopleSoft Support offers the RMA receipt notification workflow. You can use this workflow to notify the receiving manager and receiving agent when an RMA shipment is expected from a customer. Once the workflow is set up, the system sends your receiving managers and receiving agents a notification each time that a new RMA is saved in PeopleSoft Support.

RMA Receipt Workflow Notifications Setup

To enable RMA notifications, you must define people in your system with receiving manager and receiving agent roles and establish their routing preferences and email addresses.

To set up RMA notification workflow:

1. Assign the receiving manager and receiving agent roles to the appropriate employees in your system.

When an RMA is created, the receiving managers and receiving agents receive notification that a receipt for returned material is expected. You associate the receiving manager or receiving agent role to a person in your system on the Roles page under User Profiles.

We discuss this procedure in the documentation for setting up user profiles.

2. Define notification routing preferences for the people assigned the receiving manager and receiving agent roles.

When an RMA is created, the notification is published as a worklist entry, an email, or both, depending on the routing preferences defined for the group member on the Workflow page accessible through User Profiles. On that page, indicate whether the person is a worklist user, an email user, or both.

Note: Note that if you select both the **Worklist User** and **Email User** check boxes for the person, two notices—an email and a worklist entry—are published each time the workflow process is triggered for an RMA that is created. Define an email address for each person with an email notification preference.

3. Define valid email addresses for the people who receive email notifications.

For each person with an email routing preference for RMA notifications, define a primary email address in the Worker component.

Note: Person IDs defined for the worker are associated with user IDs on the User Profile page under **Workforce > Search Worker** or the User Profile component under **PeopleTools > Security > User Profiles**. For workflow notifications to work as designed, link each person in your system to one user ID only.

4. (Optional) Associate worklist groups with the people who are assigned receiving manager and receiving agent roles.

When an RMA is created, a worklist entry can be created for the worklist group that is established for the people who are assigned receiving manager and receiving agent roles in your system. A worklist group must first be defined on the Group Worklist Setup page.

See the product documentation for *PeopleTools: System and Server Administration*.

Related Links

“Group Worklist Page” (Automation and Configuration Tools)

Setting Up Material Return Processing

Successful implementation of the RMA creation functionality depends on several setup steps:

1. Define inventory business units.

Define business units in your inventory system that represent the warehouses that are to receive returned material. Activate the Business Unit EIP to insert the business units that are defined in your inventory system in the BUSINESS_UNIT_FS table in the PeopleSoft CRM system automatically. This enables you to select the appropriate inventory business unit on the RMA Form.

We discuss this procedure in more detail in the documentation for transferring stock between business units.

See *PeopleSoft FSCM: Inventory*.

2. Synchronize item, product, and customer primaries between PeopleSoft CRM and your purchasing and inventory systems.

Activate the Item Primary EIP, the Product EIP, and the Customer EIP to populate your PeopleSoft CRM tables with the primary data in your inventory and purchasing systems. Alternatively, you can manually enter item, product, and customer information in both PeopleSoft CRM and your inventory system.

3. Define requisition processing defaults in your purchasing system.

Call center business units in PeopleSoft CRM that can create RMAs must be defined as a valid source of requisitions in your purchasing system. If you are integrating with PeopleSoft Purchasing, use the Requisition Loader Defaults component in PeopleSoft Supply Chain Management to define each call center business unit as a Loader BU. Using the same component, establish processing defaults for requisitions that are staged by the call center business unit, including the purchasing business unit in PeopleSoft Purchasing that is used to process the requisitions.

When you define procurement options in PeopleSoft Supply Chain Management, you can associate the call center business unit with an appropriate distribution network on the Ship To Locations page. You can configure sourcing processes in PeopleSoft Purchasing to verify the available quantity in the distribution network before creating a purchase order with an external vendor. If the quantity exists in one of the inventory business units in the defined distribution network, the system creates a material stock request to fulfill the requisition.

See *PeopleSoft FSCM: Application Fundamentals*.

4. Define requesters in PeopleSoft CRM and your purchasing system.

The requester ID represents a person or an entity that initiates a requisition request. For advanced exchange RMA lines, the system populates the Requester field with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID as necessary. However, if you integrate with PeopleSoft Purchasing, the requester ID that you select for the RMA line created in PeopleSoft Support must be a valid user ID and requisition requester in PeopleSoft Purchasing.

5. Activate the associated service operation queues.

In your PeopleSoft Support and Inventory systems, activate the Return Material Authorization service operation. For advanced exchange RMAs, activate the Purchase Order Requisition service operation in PeopleSoft Support and in your purchasing system.

6. Define problem codes in PeopleSoft CRM and reason codes in PeopleSoft Inventory.

When you create an RMA in PeopleSoft Support, you must specify a problem code. You set up problem codes for RMAs on the Problem Codes page under **Set Up CRM > Common Definitions > Codes and Auto Numbering > Problem Codes**. If you are integrating with PeopleSoft Inventory, the problem codes that you select for RMAs in PeopleSoft Support must match the reason codes that are established on the Reason Code page in PeopleSoft Inventory. Also, the matching reason codes in PeopleSoft Inventory must be defined with a reason type of *Return Material Authorization*. When the RMA form is created in PeopleSoft Inventory, the problem code is used as the reason code. If the reason code on the RMA form does not exist in PeopleSoft Inventory, the system logs an error when the RMA service operation is processed.

7. Create a case for a customer.

Create a case using the Case component in PeopleSoft Support. RMAs must be associated with a case in your system. You cannot create an RMA without first creating a case.

Related Links

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

[Understanding Case Management](#)

“Integrating with PeopleSoft Financial Management Services” (PeopleSoft Integrated FieldService)

“Understanding Item Definition in PeopleSoft CRM” (PeopleSoft Product and Item Management)

“Understanding Products in PeopleSoft CRM” (PeopleSoft Product and Item Management)

“Business Object Relationship Modelling” (Business Object Management)

Creating RMA Transactions

This topic discusses how to create RMA transactions.

If PeopleSoft Support is integrated with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, you can create RMAs for customer returns using the pages in the RMA Form component or the Related Actions page in cases. You must save a case to save an RMA. Typically, an RMA is created from a case.

Pages Used to Create RMA Transactions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Return Material Authorization Page</u>	RF_RMA_HDR	Create and view RMA transactions.
<u>Returns - Installed Product Hierarchy Page</u>	RF_INSTPROD_VH_SEC	View the installed product hierarchy for the specified customer.
<u>Return Material Authorization - Notes Page</u>	RF_RMA_NOTE	Record comments and attach files that are related to an RMA.

Related Links

Managing Related Actions

“Understanding Installed Products” (PeopleSoft Product and Item Management)

Return Material Authorization Page

Use the Return Material Authorization page (RF_RMA_HDR) to create and view RMA transactions.

Navigation:

Support > **Returns**

Support > **Add Case**

Select **Create RMA** from the **Related Action** drop-down list box and click the **Go** button.

This example illustrates the fields and controls on the Return Material Authorization page.

Returns

Save | Search | Add RMA | Next | Previous | 360-Degree View | 360-Degree Search | >> Personalize

RMA Number 100300010 **Case ID** 220426
Unit APP01 - Appliances

Return Material Authorization | Notes

Contact Information

*Case ID 220426 Contact Jim Jacobs
 Phone 988-5600(650) Email jimjacobsdch@yahoo.com

Return Product Information Find First 1 of 1 Last

*Return to IBU Appliances *Return Date 02/19/2006
 *RMA Line Type Advanced Exchange *Problem Code Item Defective
 Site 1200 Lake Dr Circlepine MN USA *Address 1200 Lake Dr Circlepine MN USA
 Serial ID SR1004-3001 Lot ID
 Product ID SR1004
 *Item ID SR1004
 *Qty Returned 1.0000
 Requester BLEE
 Comments

Replacement Item(s) Personalize Find View All First 1 of 1 Last

Replacement Item ID	Replacement Item Name	Quantity Requested	UOM
SR1004	18000 BTU Room Air (Grey)	1.0000	EA

Go to: View Status Requisition Workbench

If your implementation includes PeopleSoft Inventory, and you logged in to the portal using the single sign-on feature, you can click the **View Status** link to access the RMA Form page in PeopleSoft Inventory. The **View Status** link is disabled in Add mode. Similarly, the **Requisition Workbench** link appears if your implementation includes PeopleSoft Purchasing, and you logged in to the portal using the single sign-on feature. This link is active only in Update/Display mode when at least one RMA line has the RMA type *Advanced Exchange*. The **Requisition Workbench** link is disabled in Add mode.

Field or Control	Description
RMA Number	Displays <i>Next</i> until you click Save . Then the system issues the RMA a number.
Case ID	The unique identifier of a case.
Customer	Displays the name of the customer who is returning the material. The customer name is populated from the case and cannot be changed. Customer records are established in your system using the Add Company or Search Company components under Customers CRM. Note: Before you create and save an RMA, a case must be created and a ship-to role must be defined for the customer defined on that case.

Field or Control	Description
Contact	The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value. Note: A contact is required if the specified customer is a company, but optional if the customer is a consumer.
Unit	Displays the business unit that is associated with the RMA.

Contact Information

This section displays information about the customer who is returning the material:

Field or Control	Description
Case ID	The unique identifier of a case. When you create a new RMA, you must specify an existing case ID before you save the RMA. You cannot change the Case ID on an existing RMA.
Phone	Select the phone number that is associated with the contact or customer.
Contact	Enter the name of the person who requested the RMA on behalf of the customer. The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value. Note: A contact is required if the specified customer is a company, but optional if the customer is a consumer.
Email	From the Email drop-down list box, select an email address that is associated with the customer, contact, or site.

Return Product Information

This section provides default information for each RMA line that you add. You can modify the information that is defined using these fields for each RMA line.

If you choose *Return to Stock* for the **RMA Line Type** field, at the top of the page or click the **Add Return Product** button, the system displays information about the product being returned to stock. If you do this, enter the appropriate information in these fields.

Field or Control	Description
Delete	Click this button to delete the row of data that is displayed.
Return To IBU (return to inventory business unit) Return To IBU	Select the inventory business unit where the customer ships the returned material. In PeopleSoft Support, a default value for this field is specified for the call center business unit on the Call Center BU page. If PeopleSoft Inventory is installed, this is a PeopleSoft Inventory business unit.
RMA Line Type	Displays the type of processing that is used for the returned material. Values are: <i>Advanced Exchange:</i> Immediately creates a replacement order for the item that the customer is returning. The replacement order can be for the same item or for a different item. You can specify the replacement in the Replacement Item(s) grid. The system populates the replacement item and requested quantity using the values defined for the return item and returned quantity. <i>Repair and Return:</i> The customer is returning an item for repair. <i>Return and Replace:</i> The item that the customer is returning must be received before a replacement order can be created. <i>Return to Stock:</i> The customer is returning material that was originally requested on a case that was not needed.
Site	Displays the identification of the customer site from which material is being returned.
Serial ID	Displays the serial number or ship-serial number of the item that the customer is returning. If the item is serial-controlled, a serial number is required for the RMA. If necessary, a different serial number can be entered at the time of receipt. Ship-serial IDs are optional for ship-serial-controlled items. Note: If you enter a value for an item that is not serial controlled or ship-serial controlled in your system, the value is removed when you save the information.

Field or Control	Description
Product ID and Product Name	Displays the identification information for the product that the customer is returning. Note: If more than one installed product record for an item ID, serial number, or product is found, the system displays the Installed Product List page, where you can select the applicable installed product record.
Item ID and Item Name	Displays the identification of the item that the customer is returning.
Qty Returned (quantity returned)	Displays the amount of the item that the customer is returning. For serial-controlled items, this quantity must be 1.
Requester	Displays the ID of the person or entity that is associated with the requisition request. The system populates this value with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID, as necessary. If you have implemented PeopleSoft Purchasing, you can use the requester ID to view the status of all the requisitions that have been entered by a specific person using the Requisition Workbench. We discuss this procedure in the documentation for reviewing requisition information. See the product documentation for <i>PeopleSoft FSCM: Purchasing</i>. Important! If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management under Structure Procurement Options.
Comments	Enter notes about the RMA (optional).
Return Date	Displays the date that the returned item is expected to be received at the inventory business unit defined as the Return To IBU . When you add a new RMA, you can specify an estimated return date for informational purposes only. The current date is the default value for this field.

Field or Control	Description
Problem Code	Select the entry that best describes the problem you are having with the product. See Setting Up Problem Codes for Material Returns.
Address	Displays the ship-to address that is specified for the customer or customer site. The system populates primary ship to address that is defined for the site, if entered, or the primary ship-to address that is defined for the customer. Displays the address associated with one of the ship-to addresses specified for the customer or customer site. When entering a new RMA, click the Override Address link to modify the address on the RMA Header Return From Address page. When viewing an existing RMA, click the Display Address link to view the address information.
Lot ID	Displays the lot number of the item that the customer is returning. Lot IDs are optional for lot-controlled items. Note: If a value is entered for an item that is not lot-controlled in your system, the value is removed when you save the information.
UOM (unit of measure)	Displays the unit by which the replacement item is measured. In most cases this will be EA for each.

Returns - Installed Product Hierarchy Page

Use the Returns - Installed Product Hierarchy page (RF_INSTPROD_VH_SEC) to view the installed product hierarchy for the specified customer.

Navigation:

Click the **View Inst Product Hierarchy** View Inst Product Hierarchy button on the Return Material Authorization page.

This example illustrates the fields and controls on the Returns - Installed Product Hierarchy page.

Returns

Installed Product Hierarchy

Filters

Customer Name MMA Property Management Group

Filtered By No additional filters

Additional Filters

Installed Product ID

Product Name

Site Name

☐ All Statuses

☒ Single Status

[Expand All](#) | [Collapse All](#) [Find](#) [First](#) **1-3 of 3** [Last](#)

- MMA Property Management Group - CRM01 301
 - Minneapolis - 478
 - INS0000013 - 24 in. Dishwasher 5 Cycles (St)**

[Return](#)

See “Viewing Installed Product Hierarchies” (PeopleSoft Product and Item Management).

Return Material Authorization - Notes Page

Use the Return Material Authorization - Notes page (RF_RMA_NOTE) to record comments and attach files that are related to an RMA.

Navigation:

Select the **Notes** page on the Return Material Authorization component.

This example illustrates the fields and controls on the Return Material Authorization - Notes page.

Save

Search

Add RMA

Next

Previous

360 360-Degree View

>>

Personalize

RMA Number 100300001

Customer [MMA Property Management Group](#)

Contact [Fred Albright](#)

Case ID 2

Customer Value Gold ★★★★★

Unit US200 - CRMCO APPLIANCES

Return Material Authorization

Notes

Notes Summary

CustomizeFindView All1-2 of 2Last

Select	Subject and Details	Attachment(s)	Added By	Date Added
☐			Stu Marx	08/19/2009 9:59AM
☐	Air Control valve is defective Air control valve needs to be replaced.		Stu Marx	08/19/2009 9:51AM

☐ Check All / Clear All

Email

Add Note

Add a Note

Added On 08/19/2009 9:59AMStu Marx

Start DateEnd Date

*Subject

Details

Apply Note

Add an Attachment

See “Understanding Notes and Attachments” (Application Fundamentals).

Managing Assets

Understanding Asset Management

This topic discusses:

- Asset management functionality.
- Asset related actions.
- Link definition setup.

Note: Asset management is relevant only to PeopleSoft HelpDesk; PeopleSoft Support and HelpDesk for Human Resources do not incorporate asset management functionality into their applications.

Asset Management Functionality

Asset management provides organizations with the ability to gather information about the hardware and software that is used over their network. The system can also detect the location of personal computers on the network.

Asset management offers these benefits:

- Provides foundation data for effective troubleshooting.
- Facilitates planning for upgrades.
- Helps control the total cost of ownership.
- Helps to accurately determine how much has been invested on a client system.
- Increases company control and security.

Note: PeopleSoft Helpdesk does not currently provide any mechanisms to detect hardware and software assets from within the PeopleSoft CRM applications. You must integrate with a third-party application for asset discovery or remote control of technology assets.

Asset Related Actions

After you set up an integration with a third-party asset management system, agents can perform these functions from the Case page or Case toolbar in PeopleSoft HelpDesk:

- Asset Administrator

Execute web administrator actions.

- Asset Summary

Run an ad hoc asset discovery process to verify configuration details of a specific asset.

- Remote Control

Execute a remote control process so a help desk agent can remotely take control of an employee's desktop to resolve a problem.

- Software Delivery

Perform software delivery related actions

Link Definition Setup

The PeopleSoft system delivers four link definitions that appear on the Case page in the Related Action drop-down list box:

- Asset Administrator
- Asset Summary
- Remote Control
- Software Delivery

Portal Crefs (content references) are set up on the Content Ref Administration page in PeopleSoft PeopleTools (select **PeopleTools** > **Portal** > **Structure and Content** > **Hidden Crefs**). Then click *Asset Administrator*, *Asset Summary*, *Remote Control*, or *Software Delivery*.

Link definitions are set up in PeopleSoft CRM on the Link Definition page (select **Set Up CRM** > **Product Related** > **Call Center** > **Link Definition**). Click the RELA (related actions) category.

On the Link Definition page, the **Field Name** in the **Search Keys** grid is set to *cfResourceIdentifier*.

Additionally, the PeopleSoft system selected the **Solvable** check boxes for all four link definitions. However, the **Self-Service** check boxes are not selected for any of the link definitions. The term *Serial Number* is associated with three link definitions (Asset Summary, Asset Administrator, and Remote Control).

At runtime, the system resolves the *Serial Number* term and adds it to the URL string. For example, the Asset Summary related action generates this URL: `http://209.17.27.128/<path to third party asset system>&cfResourceIdentifier=2UB234345`

Note: You may need to update the Portal CREF information to point to the correct URL based on your environment.

See the product documentation for *PeopleTools: Portal Technology*.

Related Links

[Understanding Link Setup](#)

Prerequisites for Managing Assets

Before you can access your asset management application from PeopleSoft HelpDesk, you must:

- Install a third-party asset management application.
- Install the third-party software on the computers that need to be discovered.
- Install the third-party remote control software on the computers that need to be remotely controlled.

Note: Refer to your third-party vendor's documentation or ask your consultant for advice on setting up an integration with PeopleSoft CRM.

Common Elements Used to Manage Assets

This topic discusses common elements used to manage assets.

Terms

These terms are used throughout this documentation:

<i>Field or Control</i>	<i>Description</i>
Asset	Any technology device, such as a computer, peripheral, or router.
Remote Control	The ability to remotely take control of a computer system.
ITAM	Information Technology Asset Management.

Managing Assets from the Case Page in PeopleSoft HelpDesk

This topic discusses how to:

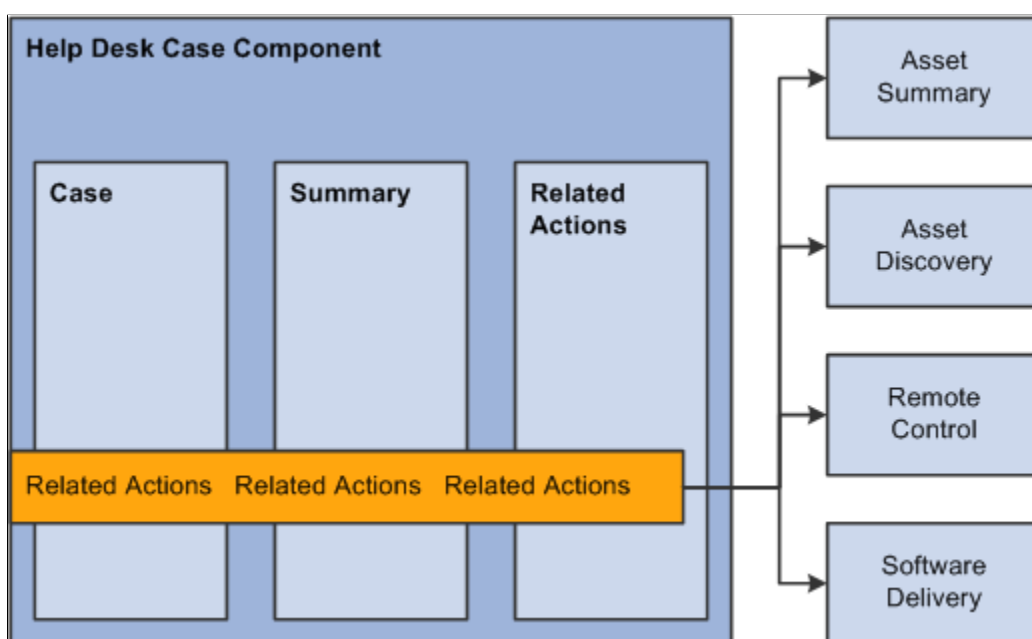
- Access the Asset Administration application.
- Access the Asset Summary process.
- Access the Asset administrator.
- Access the Remote Control action.
- Access the Software Delivery application.

Accessing the Asset Administration Application

Once an agent has opened a case for an employee, he or she can use the **Related Actions** drop-down list box on either the Case page, the Summary page, or the Related Actions page to access the asset management pages in your third-party asset management system.

Note: PeopleSoft CRM may not integrate with *all* third-party asset management systems, and PeopleSoft cannot guarantee that it will work with your particular third-party applications. PeopleSoft systems support frameworks for which you can open a URL and pass in parameters via the URL. Please ask your consultant for advice on setting up an integration from your third-party asset management system to PeopleSoft CRM.

This graphic illustrates how an agent can access the third-party asset management system from the PeopleSoft HelpDesk application.



Accessing the Asset Summary

From the Case page in PeopleSoft HelpDesk, agents can run an Asset Summary process to verify configuration details of a specific asset. Using a third-party asset discovery application, this feature also assists help desk agents in performing asset discovery.

The Asset Discovery process gives help desk agents the ability to get the baseline information about the user's asset, which helps agents resolve issues.

To identify an asset on the network:

1. The agent navigates to the help desk case.
2. The agent fills in the required information as well as the asset tag information, saves the case, and then selects *Asset Summary* from the **Related Actions** drop-down list box or the toolbar.
3. The agent then clicks **Go** to perform the action.

PeopleSoft CRM passes the serial number information to the third-party application in the URL. If the agent performs the Asset Summary action and the **Serial Number** field is not populated, the system displays an error message. Once the system performs the Asset Summary action, the system creates a record in the **Related Actions** grid. The system displays the word *Performed* in the **Status** field in the **Related Action Summary** grid on both the Summary page and the Related Actions page in the Case component.

The asset information retrieved is not transferred back to PeopleSoft CRM. Once an agent has access to the third-party application, they can locate the hardware configuration, installed software, specific network information, and the services that are running on the user's desktop.

Accessing the Asset Administrator

From the Case page in PeopleSoft HelpDesk, agents can select *Asset Administrator* from the **Related Actions** drop-down list box and then click **Go** to transfer to the third-party asset administration application.

Accessing Remote Control

From the Case page in PeopleSoft HelpDesk, agents can take control of a user's machine to troubleshoot problems by initiating the Remote Control process. Using this feature, help desk agents can effectively resolve an employee issue involving their computer equipment.

Once an agent performs the Remote Control action, the system creates a record in the **Related Action Summary** grid. The control is then transferred to the asset management application, where an agent can remotely control a user's desktop using the remote control features provided by your third-party vendor.

Generally, remote control software lets the local computer take full operational control of a remote computer, including the ability to launch applications or change system settings.

Accessing Software Delivery

From the Case page in PeopleSoft HelpDesk, agents can select *Software Delivery* from the **Related Actions** drop-down list box and click **Go**. This action launches your third-party software delivery application, which is used to install software on various identified assets.

The software delivery application enables agents to efficiently deliver software to desktops, laptops, and servers through intelligent network devices.

Once the agent performs the action, the system creates a record in the **Related Action Summary** grid on both the Summary page and the Related Actions page in the Case component.

Adding and Reconciling Installed Assets

This topic provides an overview of installed assets and discusses adding installed assets for PeopleSoft HelpDesk.

Pages Used to Add and Reconcile Installed Assets

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Installed Assets Page</u>	RF_INST_PRODUCT	Create installed assets in the PeopleSoft CRM database.
<u>Asset Reconciliation Page</u>	RF_ASSET_RECON	Display all possible entries from PeopleSoft CRM that were matched to entries in PeopleSoft Financials. Users can update the data that was entered in PeopleSoft CRM with data that existed in PeopleSoft Financials for the same asset.

Understanding Installed Assets

The Installed Assets feature enables IT asset information to be shared between the Asset Repository Module (ARM) in PeopleSoft Financials and installed products in PeopleSoft CRM. For a PeopleSoft CRM implementation, ARM is considered the primary data source for asset information.

PeopleSoft HelpDesk requires a configuration option at the setID level, which determines whether integration to the ARM is used. This option appears under the navigation **Set Up CRM > Product Related > Installed Product > Configuration**.

The **Integration Options** group box and the **Enable Asset Integration with PeopleSoft Financials** field appear on this page. If you select the check box for this field, the synchronization between the two databases is in effect.

IT asset information from PeopleSoft Financials is published to PeopleSoft CRM as an initial full data synchronization. Subsequent changes made to IT asset data in the ARM triggers an incremental synchronization that is published to update installed product information.

Likewise, any changes made to installed products asset data in PeopleSoft CRM triggers an incremental synchronization that is published to update the PeopleSoft Financials asset information.

The system evaluates data coming from PeopleSoft Financials to PeopleSoft CRM to see if a corresponding installed asset entry already exists, or whether it represents a totally new asset. In the later example, a new entry is created in PeopleSoft CRM. If a possible, but not definite, match exists, the system sends the result to a reconciliation table for analysis by an agent. The agent decides to either update an existing PeopleSoft CRM entry or create a new entry.

Note: The system checks the mapping table first to determine the product ID since a default product ID should always exist in the mapping table (even when no matches exist on the asset subtype, manufacturer, and model data). If no mapping table entry is found, the system derives the product ID from the item ID. The item ID would be used only in cases when no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

Related Links

“Understanding Hardware Asset Information Mapping and Reconciliation” (PeopleSoft Product and Item Management)

Installed Assets Page

Use the Installed Assets page (RF_INST_PRODUCT) to create installed assets in the PeopleSoft CRM database.

Navigation:

HelpDesk > Track Installed Assets > Installed Assets

This example illustrates the fields and controls on the Installed Assets page (1 of 2).

Installed Assets

Save | Search | Add Install Product | Next | Previous | 360 360-Degree View | 360-Degree Search | >> Personalize

SetID ITHD1
 Installed Product ID IHD10003
 Product Compass Notebook PC with DVD

Employee Douglas Lewis
 Asset Department Western Sales Region
 Asset Location

Installed Product | Attributes | History

Owner Information

Asset Owner

☒ Employee ☐ Department ☐ Location ☐ None

Employee Douglas Lewis

Asset Department Western Sales Region

Asset Location

Asset Contact

Show Details

Status

*Status	*Quantity	UOM
Installed	1.0000	EA

Add Status

Asset Information

Main | More

Product Group Computer Hardware

*Product ID IT1026

Description Compass Notebook PC with DVD

Item ID IT1026

Item Description Notebook P

Serial ID

Asset Tag GB102-IT1026

Install Type Sold

Date Installed 03/01/2004

This example illustrates the fields and controls on the Installed Assets page (2 of 2).

Warranty Information

Warranty Name BASIC-ITHD

Status Active

Start Date 03/01/2004

End Date 03/01/2005

Purchase Information

Purchase Order

Order ID

Purchased From

Ownership

Authorization Code

External Order ID

Purchased From Contact

Sales Representative

Operating System

Operating System

Network

Platform

Version

User Interface

Environment

Audit History

Created	By
03/19/2004 4:57PM PDT	JDILLON Joe Dillon
01/14/2008 6:05AM PST	SAMPLE

For instructions about using the Installed Assets page, refer to the section below.

Related Links

“Managing Installed Products” (PeopleSoft Product and Item Management)

Asset Reconciliation Page

Use the Asset Reconciliation page (RF_ASSET_RECON) to display all possible entries from PeopleSoft CRM that were matched to entries in PeopleSoft Financials.

Users can update the data that was entered in PeopleSoft CRM with data that existed in PeopleSoft Financials for the same asset.

Navigation:

HelpDesk > Asset Reconciliation > Asset Reconciliation

This example illustrates the fields and controls on the Asset Reconciliation page.

Asset Reconciliation

Select Match or Create New

Serial ID A43-22342

Department Human Resources

Tag Number

Location

Employee ID KU0015

Product Compass Notebook PC with DVD

Possible Installed Asset Matches

Customize | Find | View All | [Grid Icon] | [Print Icon] | First 1-2 of 2 Last

	Serial ID	Asset Tag	Employee	Department	Location	Product ID	Description
☐		GBI02-IT2037	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD
☐		GBI02-IT1026	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD

Merge Selected Installed Asset

Create New Installed Asset

For instructions about using the Asset Reconciliation page, refer to the section below.

Related Links

“Mapping and Reconciling Asset Information” (PeopleSoft Product and Item Management)

Understanding Asset Lifecycle Management (ALM) for CRM HelpDesk

CRM Asset Lifecycle Management Business Processes

Asset Lifecycle Management (ALM) expands agent and administrator asset management business capabilities through integration with PeopleSoft Financials and third-party asset discovery and control systems.

Using ALM, asset data administrators can:

- Increase control and security of asset data.
- Plan system upgrades more easily.
- More effectively manage the system's total cost of ownership.

Using ALM and your third-party system, help desk agents use case page actions to:

- Run an ad hoc asset discovery process to verify configuration details of a specific installed asset.

Accessed using the **Asset summary** action.

- Remotely control an employee's desktop to resolve a problem.

Accessed using the **Remote control** action.

- Browse inventory, manage product ads and packaging, and create and manage queries and notifications.

Accessed using the **Asset administrator** action.

- Distribute software to the enterprise.

Accessed using the **Software delivery** action.

Asset Management Functionality

Asset management provides organizations with the ability to gather information about the hardware and software that is used over their network. The system can also detect the location of personal computers on the network.

Asset management offers these benefits:

- Provides foundation data for effective troubleshooting.

- Facilitates planning for upgrades.
- Helps keep the total cost of ownership under control.
- Helps to accurately determine how much has been invested in a client system.
- Increases company control and security.

Note: PeopleSoft HelpDesk does not currently provide any mechanisms to detect hardware and software assets from within its CRM applications. You must integrate with a third-party application for asset discovery or remote control of technology assets.

Related Links

“Understanding Installed Products” (PeopleSoft Product and Item Management)

Integration Architecture and Data Flow

Asset Lifecycle Management is based upon the sharing of information technology (IT) asset information between the Asset Repository Module (ARM) in PeopleSoft Financials and installed products in PeopleSoft CRM. For a PeopleSoft CRM implementation, the ARM is considered the primary data source for asset information.

IT asset information from PeopleSoft Financials is published to PeopleSoft CRM as an initial full data synchronization. Subsequent changes made to IT asset data in the ARM triggers an incremental synchronization that is published to update installed product information.

Likewise, any changes made to installed product asset data in PeopleSoft CRM triggers an incremental synchronization that is published to update the PeopleSoft Financials asset information.

The system evaluates data coming from PeopleSoft Financials to PeopleSoft CRM to determine whether a corresponding installed asset entry already exists, or whether it represents a new asset. If there is a definitive match, the CRM installed asset entry is automatically updated with the information from the corresponding Financials entry. If there is a possible, but not definite match, the result is sent to a reconciliation table for analysis by an agent, where he or she makes the decision to either update an existing PeopleSoft CRM entry or create a new entry. If the data represents a new asset, a new entry is created in PeopleSoft CRM.

All Financials entries of Asset_Type 010 (IT-Hardware) are added to the CRM installed asset table when the full sync is performed (COPY_IT_ASSET). Subsequent additions and updates to the Financials asset repository data for Asset_Type 010 entries are thereafter sent to CRM for incremental synchronization.

Understanding Installed Assets

This topic discusses system management of new and updated data in the integrated system.

Identifying a Financials Asset in CRM

The CRM Installed Product table requires a Product ID for every Installed Asset. This enables users to see the kind of asset that is being referred to in the system. Since neither Product ID nor Inventory Item ID are required for entries in the Financials Asset table, it is important that CRM installed product table entries are assigned a Product ID.

The CRM system assigns Product IDs according to the Product Mapping table.

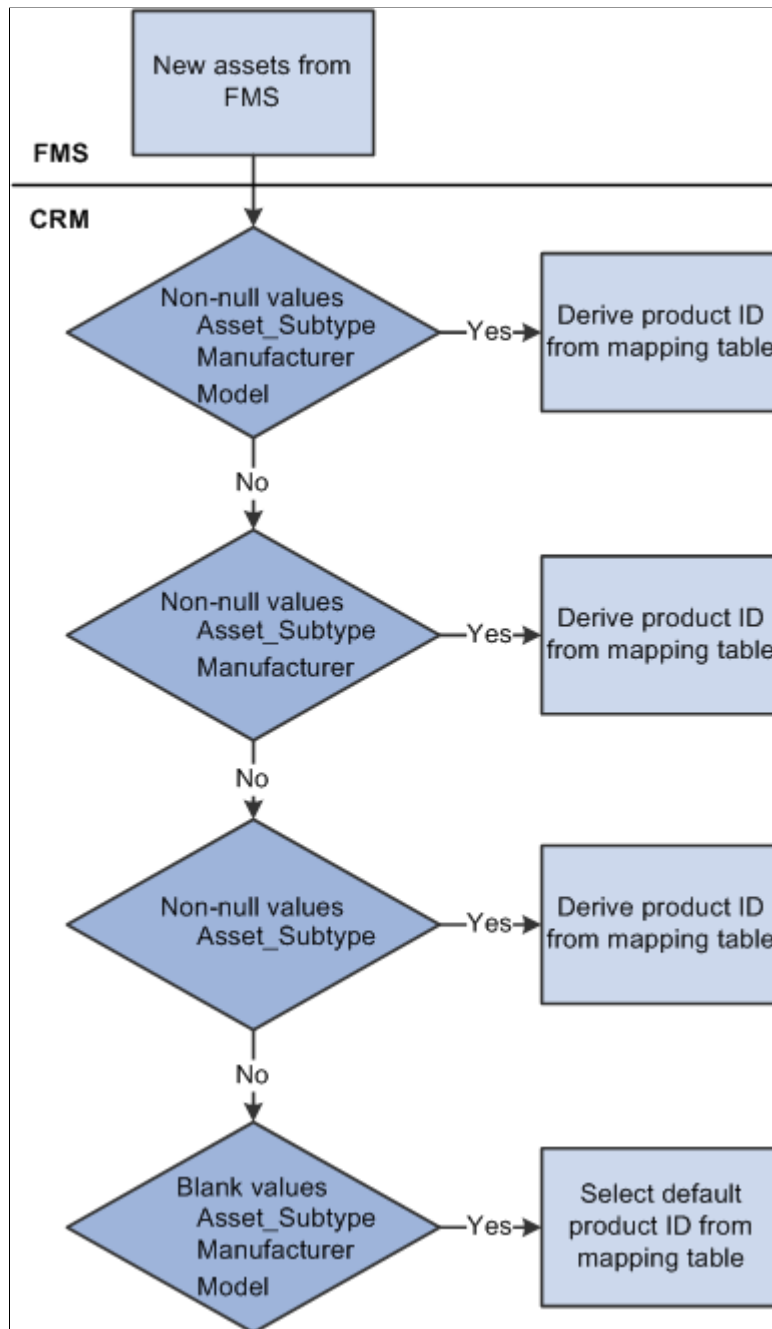
Note: PeopleSoft Financials assets do not store product data, but product ID is a required attribute for CRM installed assets. Therefore, a mapping table specifies the Product ID that CRM should use to create a new entry from Financials asset data. The administrator can add entries to the mapping table to link specific combinations of asset subtype, manufacturer, and model values from Financials with a particular CRM Product ID. Additionally, a default entry is required in the CRM mapping table (designated by just a Product ID value with no subtype, manufacturer, or model values). The CRM system uses the default to create installed asset entries if the mapping table contains no match on more specific combinations of subtype, manufacturer, and model values.

The system checks the mapping table first to determine the product ID since there should always be a default product ID for use in the mapping table (even when there are no matches on the asset subtype, manufacturer and model data). If no mapping table entry is found, the system derives the product ID from the item ID. Thus, the item ID is used only in cases where no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

Assignments by Matching Attribute Values

Ideally, each combination of Financials Asset_Subtype, Manufacturer, and Model corresponds to a CRM product, and each will map to an asset that can conceivably be returned by the Financials system (including the discovery process run on the Financials system). This enables a meaningful CRM product to be associated with each type of Financials asset.

This graphic illustrates how a Product ID is determined for a new asset in the CRM system.



When receiving information on a new asset from the Financials system, the CRM system checks the Financials Asset table for a match on non-null values for the Asset_Subtype, Manufacturer, and Model fields. If there is a match, the CRM system uses the corresponding Product from the mapping table to create the new installed asset on the CRM system. If there is no match for the three fields, a match will be attempted on Asset_Subtype and Manufacturer. If a match is found here, the corresponding Product_ID will be used. If no match is found on these two fields, a match will be attempted only on Asset_Subtype. If no match is found on this field, a match will be attempted just on blank values for Asset_Subtype, Manufacturer, and Model (this type of row will correspond to a “default” Product_ID).

Note: A *SaveEdit* error on the mapping page requires a value for Manufacturer if a value for Model is present on that row. In addition, this *SaveEdit* error requires that the user enter a single “default” value specifying a Product that should be used when no other match applies. This helps ensure that CRM Products can be identified and used for any asset entry that comes from Financials.

As already mentioned, the user ideally would set up data so that the assets sent from Financials (Asset type of IT-Hardware) have values for Asset Subtype, Manufacturer, and Model, and ensure that each of these combinations is mapped to a distinct Product on the mapping page. This would involve setting up the appropriate Asset Subtypes and Profiles on the Financials side, and the appropriate Products and product mapping setup page on the CRM side. Providing a “default” Product ID as described above ensures that a Product ID can always be found for use in the CRM Installed product table. This is required since the CRM Installed Product table requires a Product ID value for each of its entries.

Important! Before adding data to the Product Mapping page, the user must run the *Manufacturer_Fullsync* and *Copy_AM_Subtype* full synchronizations. Synchronizations are discussed further in Chapter 2, Setting Up Integration and Data Transfer, “Setting Up the Mapping Table.”

Updating CRM Asset Data With New Asset Information from Financials

When asset data is sent from Financials to CRM, the CRM installed asset table is updated with the corresponding asset data. The identification logic involves filtering data attributes to find matches between Financials and CRM. The logic must account for definite positive matches, assumed positive matches, and ambiguous match results.

Positive Matches

This table depicts the conditions that result in the three possible update outcomes when the CRM system identifies a match of one or more of the four asset table values in the Financials asset data:

<i>Required Match Conditions</i>	<i>CRM Update Outcomes</i>			
<i>Serial ID</i>	<i>Business Unit</i>	<i>Asset ID</i>	<i>Installed Product ID</i>	
	Match*	Match*		The CRM data for that row is updated with all the values from Financials. This may occur when data for an asset has previously been received from Financials by CRM and a change is subsequently saved and published by Financials.

<i>Required Match Conditions</i>	<i>CRM Update Outcomes</i>			
<i>Serial ID</i>	<i>Business Unit</i>	<i>Asset ID</i>	<i>Installed Product ID</i>	
			Match	The CRM data for that row is updated with all the values from Financials. This may occur when data for an asset was created by CRM and sent over to Financials and a change is subsequently saved and published by Financials. The corresponding CRM entry would have the same Installed Product ID but would not yet have values for Business Unit and Asset ID.

<i>Required Match Conditions</i>	<i>CRM Update Outcomes</i>			
<i>Serial ID</i>	<i>Business Unit</i>	<i>Asset ID</i>	<i>Installed Product ID</i>	
yes	No match*	No match*		The CRM data for that row is updated with all the values from Financials. This may occur if data for the same asset has been entered independently in both Financials and CRM prior to initial synchronization. If data for the same asset has been entered in Financials and CRM in a prior release, the Financials entry will initially not have the key fields for the corresponding CRM entry and the CRM entry will initially not have the key fields for the corresponding Financials entry. However, if both entries refer to the same Serial ID, it can be assumed that they refer to the same actual asset.

* Both conditions must be true.

Assumed Positive Matches

Match conditions vary depending on the asset:

- Asset Tag

If there is a match between Financials and CRM based on identical non-null values for asset tag and product, and if there is a blank value for Business Unit, Asset ID, and Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies in situations where data for the same assets already existing in Financials and CRM (but in which CRM may only have a value for Asset_Tag, rather than Serial ID), and an update from Financials needs to be matched against the corresponding CRM entry.

- Employee and Product

If there is a single matching row between Financials and CRM based on identical non-null values for employee ID and product ID, and there is a blank value for Business Unit, Asset ID and Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies in situations where data for the same actual assets already exists in Financials and CRM, and an update from Financials needs to be matched against the corresponding CRM entry. If there is single entry in CRM that matches the assigned employee and Product, it is assumed to refer to the same actual asset, and the CRM entry will be updated.

- **Department and Product**

If there is a single matching row between Financials and CRM based on identical non-null values for Department ID and Product ID and there is a blank value for Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies to situations where data for the same actual assets already exists in Financials and CRM (but in which CRM may only have a value for Asset_Tag, rather than Serial ID), and an update from Financials needs to be matched against the corresponding CRM entry. If there is a single entry in CRM that matches the assigned department and Product, it is assumed to refer to the same actual asset, and the CRM entry will be updated.

Ambiguous Matches

When it is not possible to unequivocally determine that the asset is definitely the same or definitely different on both systems, the data for that row is sent to a reconciliation table that the administrator can access in the CRM application. The reconciliation table lists the assets, with their attribute data, that require reconciliation with CRM entries. The administrator can open each entry to view the possible matches with existing CRM installed assets based on the matches on Product_ID and one or more of the following: Emplid, Deptid, or Location.

The administrator can:

- Confirm that the CRM entry refers to the same asset represented by the data from Financials and update the CRM data with all the values from the Financials system.
- Specify that the Financials data does not refer to any asset on the CRM side and create a new CRM installed asset.

The asset manager reconciles ambiguous matches on the Asset Reconciliation page, shown in this figure.

This example illustrates the fields and controls on the Asset Reconciliation example.

Asset Reconciliation

Select Match or Create New

Serial ID A43-22342

Department Human Resources

Tag Number

Location

Employee ID KU0015

Product Compass Notebook PC with DVD

Possible Installed Asset Matches							
Serial ID	Asset Tag	Employee	Department	Location	Product ID	Description	
☐		GBI02-IT2037	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD
☐		GBI02-IT1026	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD

Merge Selected Installed Asset

Create New Installed Asset

In this example, a Financials entry for a Compass Notebook computer with Serial ID A43-22342 belonging to Carmichael Espinosa (Emplid KU0015) was received. However, the search results show two existing CRM installed assets for the same person and product. Since the CRM entries have no Serial_ID value, it is not possible to automatically determine if either asset is the same actual asset as the Financials entry; the match results are ambiguous.

The asset manager must now conduct research on the two CRM entries to determine whether either of them does indeed represent the same asset as the new entry from Financials (serial id A43-22342). If research indicates that the actual asset represented by the first CRM entry (Asset Tag GBI02-IT2037) has a serial ID of A43-22342, then it is in reality the same asset as the entry from Financials. To reconcile the data, the manager selects the first CRM asset in the table and clicks the **Merge Selected Installed Asset** button, thus merging the data from the new Financials entry with that CRM installed asset entry.

On the other hand, if neither serial ID of the two CRM entries corresponds to the Financials entry, then the entry represents a different physical asset. The manager reconciles the new data by clicking the **Create New Installed Asset** button to create a new CRM Installed Asset entry from the data of the Financials entry, giving Carmichael Espinosa a total of three Compass Notebook installed asset entries.

With ambiguous matches, often data for the same actual assets exists in Financials and CRM (but in which CRM may only have a value for Asset_Tag, rather than Serial_ID) because the lack of matching unique identifiers and/or the presence of multiple potential matches prevents a positive match.

Note: The status value of a Financials asset does not map directly to the status of the corresponding CRM installed asset. The Financials system will only update the CRM Installed asset entry to "Installed" or "Uninstalled", depending on what transaction is being executed in Financials.

For example, whenever a user updates an asset in the Basic Add page in Financials, the status of the new or existing CRM installed asset is updated to "Installed" (stored in the system as "INS") regardless of the actual status value of the asset in Financials. Whenever a user disposes of an asset in the Financials system, the status of the corresponding CRM installed asset is set to "uninstalled" (stored in the system as "UNI").

Creating Work Orders from Cases

Understanding Work Order Requests

This topic discusses:

- Work order functionality.
- Integration points with PeopleSoft Financials.
- Work order descriptions and status changes.
- Relationships between work orders and cases.
- Work orders and the 360-degree view.
- Installed product history.

Note: Work order requests pertain to PeopleSoft HelpDesk only; PeopleSoft Support and PeopleSoft HelpDesk for Human Resources do not incorporate work order functionality.

Work Order Functionality

If an agent is working on a help desk case that he or she cannot resolve, the agent can create a work order from the case to assign a technician to troubleshoot and solve the problem.

The agent creates a work order when the solution search results recommend the creation of a work order or the agent determines that he cannot resolve the case in a reasonable amount of time.

To create a work order from a case, an agent must select *Worker Order - New* from the **Actions** field on either the Case page, the Case - Summary page, or the Case - Related Actions page, and then click the **Go** button. This action takes the user to the Create Work Order page. When the agent provides the required information on the Create Work Order page and clicks the **Create Work Order** button, the Add Work Order Transaction message is triggered.

Once an agent creates a work order, a help desk agent can:

- Access the work order in PeopleSoft Maintenance Management from the **Related Actions** section on the Case - Summary page or the Case - Related Actions page.
- Receive workflow events in his or her worklist when there is a status change or description change on the work order.

If an Active Analytics Framework (AAF) status change or description change policy is activated, both email and worklist notifications are sent.

- Relate existing work orders to cases.

Integration points with PeopleSoft Financials

The integration between IT HelpDesk in PeopleSoft CRM and Maintenance Management in PeopleSoft Financials is accomplished with application messaging using the PeopleTools Integration Broker.

The following messages are used for this integration:

Main Messages

These are the main messages that the system uses to transfer information:

- Add/Update Work Order Transaction (SYNC_WORK_ORDER_REQ)
- Add/Update Transaction Acknowledgement (SYNC_WORK_ORDER_RSP)
- Key Event Change Notification (SYNC_WM_WO_KEY_EVENT)

Setup Messages

These are the setup messages that the system uses to transfer information:

- Problem Code Tree (COPY_PROBLEM_TREE)
- Problem Location (COPY_SHOP_LOC)
- Work Order Status (COPY_WO_STATUS)
- Work Order Priority (COPY_WM_PRIORITY)

Work Order Descriptions and Status Changes

When the work order description or status on the Work Order page changes, the system sends the Key Event Change Notification message to PeopleSoft HelpDesk.

To trigger changes to a case when its associated work order's status or description changes requires that you use AAF to create a case change policy triggered by work order status and description changes.

Use these terms to build a new policy within the Case Update Action Type:

- Work Order ID
- Work Order Summary
- Work Order Description (Task Notes)
- Work Order Status

For example, a policy can specify that when the work order status changes from *Open* to *Closed*, the system updates the case status to *Closed* and notifies the requester or sends the customer a satisfaction survey.

The Key Event Message is not, however, enabled by activating AAF policies. You must also subscribe to the Key Event message. When a user changes the status or description on a work order, the system triggers the AAF description and status changes and then publishes the Key Event message.

To create policies for work order changes:

1. Navigate to **Enterprise Components > Active Analytics Framework > Policies > Manage Policies**.
2. Access either the Work Order Status Change or Work Order Description Change policy.
3. Click the **Activate** button.

These policies represent a message display process that runs when the event type in the Key Event Change Notification message is set to a work order status change or a work order description change.

Once the message is activated, the agent can click the URL in the worklist or email notification to launch the Case Summary page for the case that is associated with the work order.

See *Active Analytics Framework*.

See “Understanding CRM Action Types” (Automation and Configuration Tools).

Relationships Between Work Orders and Cases

Cases can be related to one another to create cross-referencing in a help desk knowledge base. For the same reason, correlating similar work orders is often advantageous. However, the system does not allow a work order to be related to another work order. Instead, work orders are related to each other through a case. For example, when two cases pertain to the same problem and one case has a related work order, instead of creating another work order on the second case, relate the second case to the first case by searching on the work order ID or the description.

An agent can create as many work orders per case as necessary. Conversely, an agent can create multiple cases for the same problem and work order. In this situation, the work orders can be related to each other through a *global* case that represents the other cases with the common work order. The work order the agent can relate the cases to is then associated with the common work order.

All workflow is then driven off the global case. For example, when the status of the common work order changes, email notifications are sent to agents assigned to the related cases.

When an agent creates a help desk case for an employee and determines that a work order is needed, the agent can also determine if the issue is global (for example, a network or common area printer is down). The agent can check for the existence of a global case with a related work order. AAF policies, however, do not send workflow to all related cases.

Work Orders and the 360-Degree View

If a work order is associated with a case, agents can view the work orders on the Worker 360-Degree View page. Work orders appear as a node on a tree. For each work order status, the system displays a link and the number of work orders at that status.

When an agent clicks one of the links, the system displays all work orders with that status in a dynamic grid in the right-hand column of the page. This display includes all work orders with a specific status that are associated to cases that have been reported by the employee.

The dynamic grid contains 4 columns:

- Work Order ID

- Work Order Description
- Work Order Status
- Case ID

Help desk agents can access the work order in PeopleSoft Financials by clicking the work order ID from the 360-Degree View page in PeopleSoft CRM. The agent does not have to log in to PeopleSoft Financials to access the work order because the system uses single signon technology for access to both databases. The work order tree node only appears on the Worker 360-Degree View page.

Installed Product History

After an agent creates a work order, the **Work Order ID** field appears in the **Associated Cases** grid on the Installed Product History page. If a case has more than one work order associated with it, the case ID is repeated on additional rows; however, the work order ID is unique. The system turns the work order ID into a link, which enables the agent to access the work order in PeopleSoft Financials through a single sign on.

Creating Work Orders

This topic discusses how to create work orders in PeopleSoft CRM.

Page Used to Create Work Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Create Work Order Page</u>	RC_LINK_WO_SEC	Create a work order in PeopleSoft Financials. You can also create a new work order from the Case - Summary page and the Case - Related Actions page using the same method described previously.

Create Work Order Page

Use the Create Work Order page (RC_LINK_WO_SEC) to create a work order in PeopleSoft Financials.

You can also create a new work order from the Case - Summary page and the Case - Related Actions page using the same method described previously.

Navigation:

HelpDesk > Add Case > Case

Select *Work Order - New* from the **Related Actions** drop-down list box and then click **Go**.

HelpDesk > Search Cases > Case

Select *Work Order - New* from the **Related Actions** drop-down list box and then click **Go**.

This example illustrates the fields and controls on the Create Work Order page.

Create Work Order

Employee Name Carmichael Espinosa

Asset Tag

Product Description Toshiba Tecra Series

***Summary** CD ROM doesn't work all the time

Description Seems to be a problem with the CD read/write head. Laptop can't always read CD's

***Problem** IT - Computers

***IT** Hardware

***Hardware** CD ROM doesn't read

***Service Location** Shop A, Pleasanton, USA

Work Order Priority Standard

[Create Work Order](#) [Cancel and Return to Case](#)

The system takes information from the Case page and displays it on the Create Work Order page for these fields: **Employee Name**, **Asset Tag**, **Product Description**, **Summary**, and **Description**.

Note: If necessary, an agent can change or add additional text to the **Summary** and **Description** fields.

Field or Control	Description
Problem	Select the problem that best describes the caller's issue. The system may or may not display additional problem fields based on the parent-child relationships that exist between the problem codes. The problem code fields guide an agent's choices for identifying or classifying the problem. Each level in the problem selection provides a more detailed explanation as to the type of problem being reported against the installed asset. Based on the selection, the system may display additional fields, such as Computer, ITAM (Information Technology Asset Management) and Hardware. The problem code you select also drives the available values for shop location, as would be the case if shops are categorized by the problem they service. This data comes from the Financials Work Management application. The problem code that you select here drives the values that the system uses to create the work order in PeopleSoft Maintenance Management.
Service Location	Select the location where the item will be serviced. The system pulls information in the service location drop-down list box from the Work Management Shop Location table (PS_WM_SHOP_LOC2_VW). The service location is the location where the installed asset is sent for repair. This location can also be the where the technician is located.
Work Order Priority	Select a value that matches the priority that you think should be given to the problem you are having. This field is used as an override. If it is not populated, the system populates the Priority field from the work order problem code.

Viewing Work Orders

This topic discusses how to view work orders in PeopleSoft CRM.

Pages Used to View Work Orders

Page Name	Definition Name	Usage
<u>Case - Summary Page</u>	RC_CASE_SUMMARY	View work orders.

Page Name	Definition Name	Usage
Case - Related Actions Page	RC_ASSOCIATION	View work orders.
Installed Assets - History Page	RF_INST_PROD_HIST	View work orders that are related to cases.

Case - Summary Page

Use the Case - Summary page (RC_CASE_SUMMARY) to view work orders.

Navigation:

HelpDesk > Search Cases > Summary

This example illustrates the fields and controls on the Case - Summary page: Related Action Summary section.

Related Action Summary				
Type	Summary	Status	Date Created	Added By
Work Order	0000000020 - CD ROM doesn't wo...	Open NOW	08/28/2009 2:19PM PDT	Stu Marx
Work Order	New		08/28/2009 2:35PM PDT	Stu Marx

Related Actions

This example illustrates the fields and controls on the Case - Related Actions page.

Case
08/28/2009 2:32:59PM PDT
My Time Zone

Case ID 220536 **Status** Open - New Case
Employee ID KU0015 **Employee Name** [Carmichael Espinosa](#)
Summary CD ROM doesn't work all the time **Contact Method**

Related Action Summary				
Type	Summary	Status	Date Created	Added By
Work Order	0000000020 - CD ROM doesn't wo...	Open NOW	08/28/2009 2:19PM PDT	Stu Marx
Work Order	New		08/28/2009 2:35PM PDT	Stu Marx

Related Actions

This example illustrates the fields and controls on the Installed Assets: History page - Related Transactions.

The screenshot shows the 'Installed Assets' page with the 'History' tab selected. The page displays asset details for 'SetID SHARE', 'Installed Product ID 300043', and 'Product Toshiba Tecra Series'. It also shows employee information for 'Carmichael Espinosa' in the 'Human Resources' department at 'Corporation Headquarters'. Below this, there are tabs for 'Events', 'Related Transactions', 'Interactions', and 'Audits'. The 'Related Transactions' tab is active, showing a table of cases. The table has columns for Case, Work Order, Summary, Status, Date Created, Created By, and Date Closed. Two rows are visible, both for case '220536' with work order '0000000021' and '0000000020', both with a status of 'Open - New Case' and a date created of '08/28/2009'. The 'Created By' field for both rows is 'Oprid for CRMSKT, CRMQABAK'. Below the table, there is a section for 'Change Requests' which states 'There are no associated change requests.'

Case	Work Order	Summary	Status	Date Created	Created By	Date Closed
220536	0000000021	CD ROM doesn't work all the time	Open - New Case	08/28/2009	Oprid for CRMSKT, CRMQABAK	
220536	0000000020	CD ROM doesn't work all the time	Open - New Case	08/28/2009	Oprid for CRMSKT, CRMQABAK	

Before PeopleSoft CRM receives the Add/Update Transaction Acknowledgement message from PeopleSoft Financials, the system populates these fields in the **Related Action Summary** grid:

- **Type**

The system populates this field with the words *Work Order*.

- **Summary**

The system populates this field with the word *New*, indicating that the work order is in the process of being created.

- **Status**

The system does not populate this field until the work order is actually created in PeopleSoft Maintenance Management.

- **Date Created**

Date the agent initiated the creation of the work order (not the date the work order was actually created in PeopleSoft Maintenance Management).

- **Added By**

The system populates this field with the login name of the agent who created the work order.

Note: If another help desk case is related to an existing work order, the **Added By** field displays the name of the agent who created the work order, not the name of the person who linked the existing work order to the case.

Once PeopleSoft CRM receives the Add/Update Transaction Acknowledgement message, the system updates the Related Action Summary grid for the work order row. Updating consists of displaying the work order ID and description in the **Summary** field and turning the text into a link that agents can use to

view the work order in PeopleSoft Maintenance Management. Additionally, the system resets the **Status** field to the Work Order header status and sets the **Date Created** field to the date and time that the work order was created in PeopleSoft Maintenance Management.

When a work order cannot be created in PeopleSoft Financials, it sends an error message to the CRM database. To view the message, click the **Error Details** link on the Case - Related Action Summary page.

Replying to Work Order Information Requests

This topic provides an overview of information requests and discusses how to reply to information requests for work orders in PeopleSoft CRM.

Page Used to Reply to Work Order Information Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Reply To Work Order Information Request Page	WM_WO_NOTE_REPLY	Provide more information to the technician who is working on a fix or servicing your customer's problem.

Understanding Information Requests

To request information on the work order for a specific task, a technician must create a task note in PeopleSoft Maintenance Management by selecting the **Needs Reply** check box and then entering text in the **Note** field requesting additional information.

When the technician clicks the **Send To Requester** button, PeopleSoft Maintenance Management sends a request for information by email to the agent handling the case and sets an indicator on the Work Order, Tasks Notes, and Notes pages in PeopleSoft Maintenance Management to capture the request for more information. This indicator is also used to capture request-for-information replies from PeopleSoft CRM. The contents of the email notification are determined by PeopleSoft Maintenance Management.

To respond to the request, the agent using the CRM application clicks the URL in the email. The URL has the work order ID embedded in it. When an agent clicks the link, the system displays the Reply To Work Order Information Request page in PeopleSoft Maintenance Management. The agent completes the reply and saves it.

After the agent saves the Reply to Work Order Information Request, PeopleSoft Maintenance Management creates a new work order task note to capture the reply, updates the reply indicator on all pages, and sends an email notification to the technician indicating that a reply has been received.

PeopleSoft HelpDesk ignores the Key Event Change Notification message when it contains a request for more information and a reply to a request for more information, as the work order task notes are not stored on the Case Notes page in PeopleSoft CRM.

For information purposes only, the Key Event Change Notification message sends the note, case ID, and work order ID to PeopleSoft HelpDesk. In the event that the case is reassigned to another agent, the Add Work Order Transaction message sends contact information to PeopleSoft Maintenance Management. Therefore, PeopleSoft Maintenance Management should always have the most current assigned-to person

for a given case. To complete the process, the technician reviews the note and selects the **Reviewed** check box. PeopleSoft Maintenance Management updates the reply indicator on the Work Order, Tasks Notes, and Notes pages.

Reply To Work Order Information Request Page

Use the Reply To Work Order Information Request page (WM_WO_NOTE_REPLY) to provide more information to the technician who is working on a fix or servicing your customer's problem.

Navigation:

Click the URL in the request for information email that is sent from PeopleSoft Maintenance Management.

This example illustrates the fields and controls on the Reply To Work Order Information Request page.

Reply To Work Order Information Request

Business Unit US001 Work Order ID 12345678 oil change

Original Message

From: J. Technician

For Business Unit/Case CRM BU #1/Case #1

Subject: Request #0003 - 08/10/04

Note: Please provide date of last major maintenance

Reply Message

Reply To: J. Technician

Subject: Reply To #0003

Note: Last major maintenance performed on 3/1/02

Save

Enter the information that the technician requested in the **Note** field in the Reply Message section of the page. Click **Save** when you are finished. The system creates a new work order task note to capture the reply, updates the reply indicator on all pages, sends an email notification to the technician indicating that a reply has been received, and sends a Key Event Change Notification message with the response text to PeopleSoft HelpDesk.

Working with Services Operational Dashboards

Understanding Services Operational Dashboards

Services operational dashboards are collections of pagelets that are built to provide real-time actionable information for call center managers and agents, which help to increase agent efficiency, offer insight on customer needs and provide call center staff the tools needed to better serve the customer base. PeopleSoft CRM delivers two role-specific dashboards for call centers:

- Manager Dashboard
- Agent Dashboard

Each dashboard consists of pagelets that display call center data relevant to users of that role. Within pagelets, managers and agents can interact with data that is presented in charts and grids by drilling into bars and clicking links, which give them additional information about cases and solutions, as well as better insight on customers that require immediate actions.

Delivered pagelets are WSRP (web services for remote portlets) compliant so they can be used in any WSRP-compliant portal (for example, Applications Portal) or any other compliant external portal. They can be rearranged freely on dashboards by dragging and dropping by their titles to the desired areas, or by clicking the Layout link on the PIA homepage to personalize the dashboard's layout. In addition to the Manager and Agent Dashboards, these pagelets can also appear on the PIA homepage through configuration on the Personalize Content page (PORTAL_HPCOMP).

See *PeopleTools: Applications User's Guide*, Setting User Preferences, Personalizing Layout.

Manager Dashboard

The Manager Dashboard displays operational data for cases that are assigned to provider groups and these provider groups are associated with the manager that is selected in pagelet personalization pages of the logged on user. The manager-provider group relationship is established on the Provider Groups page.

The Manager Dashboard includes these pagelets out of the box:

- Cases at Risk of Exceeding SLA (service level agreement)
- Manager Case Backlog
- Case Arrivals versus Closures
- Top Solutions by Product
- Top Solutions by Library

- Top Solutions by Category

See Working with the Manager Dashboard for more information on dashboard pagelets.

Agent Dashboard

The Agent Dashboard displays information of all open cases that are assigned to the logged on agent. It includes these pagelets out of the box:

- My Case Backlog
- My Open Case SLA Status
- Agent - My Cases
- Top Solutions by Product
- Top Solutions by Library
- Top Solutions by Category

See Working with the Agent Dashboard for more information on dashboard pagelets.

Understanding Pagelets with Bar Charts

Several delivered pagelets represent case information in the form of stacked bar charts. These charts are interactive. When you put your mouse over a bar, hover text appears, showing the number of cases with the status or priority that the bar represents. When you click a bar, a modal secondary page is displayed:

This example illustrates the fields and controls on the Modal secondary page appears with a list of cases after clicking a bar on a stacked bar chart.

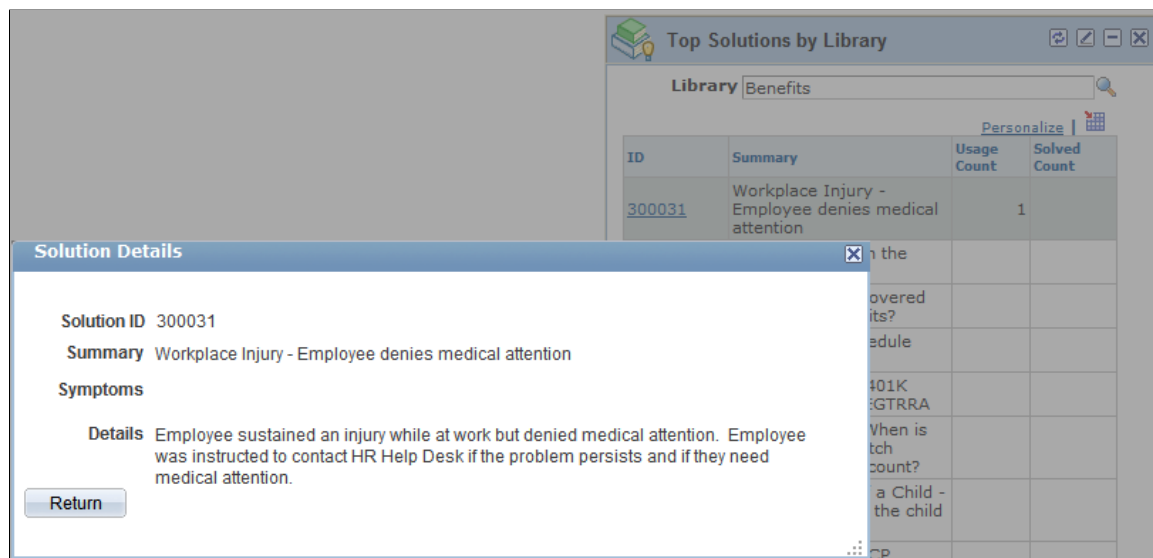
Case ID	Summary	Employee	Priority	Status	Case Type	Assigned To
220339	Would like to know if there is a maximum amount of time one can be out on a leave	Carol Hamilton	Medium	Open - New	Change Request	Claudia Salinger
220406	Leave of Absence	David Cole	Medium	Open - Research	Question/Problem	Claudia Salinger
220408	Leave of Absence	David Cole	Medium	Open - Research	Question/Problem	Claudia Salinger
220412	Leave of Absence	Antonio Santos	Medium	Open - Research	Question/Problem	Claudia Salinger
220525	Can't access self service website	Antonio Santos	Medium	Open - New	Question/Problem	Claudia Salinger

The page lists the summary information of the cases that the bar represents. Clicking a case ID link transfers you to the Case component on a new browser window where you can update the case.

Understanding Pagelets with Grids

Solutions-specific pagelets are built in the form of grids. Each grid displays the top ten solutions with the highest solved counts and usage counts. It shows basic information such as solution summary, usage counts and the number of times they are used to solve cases. For each solution-specific pagelet, you can change the criterion (product, solution library, and category) by which the solution information is filtered. You can also click a solution ID link to transfer to a modal secondary page and view the solution in more detail:

This example illustrates the fields and controls on the Modal secondary page appears with solution detail after clicking a solution ID link.



Important! Make sure to run the Update Solution Usage Counts process that updates solution usage and solved count, so that solutions can be ranked and displayed properly on pagelets.

Setting Up Services Operational Dashboards

Perform these steps to set up services operational dashboards:

- Specify default values for use in dashboard pagelets on the Call Center page of the User Preferences component for dashboard users.

See “Call Center Page” (Application Fundamentals).

- Specify a manager for each provider group on the Provider Groups page for bar charts on Manager Dashboard to show information properly based on the manager selected in personalization settings.

See “Defining Provider Groups” (Application Fundamentals).

- Make sure that the **Percent of SLA for Red** and **Percent of SLA for Yellow** options are enabled on the Business Unit - Options page for SLA pagelets to display information properly.

See [Business Unit - Options Page](#).

- Run the Update Solution Usage Counts AE process to update solution usage counts as well as solution usage counts by categories, types and details.

See “Update Solution Usage Counts Page” (PeopleSoft Services Foundation).

Working with Services Operational Dashboards

This topic discusses how to work with Services Operational Dashboards.

Pages Used to Work with Services Operational Dashboards

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Services Manager Dashboard Page HelpDesk Manager Dashboard Page HR HelpDesk Manager Dashboard Page Service Center Manager Dashboard Page	(not applicable)	Access the Manager Dashboard to view information and take actions regarding cases that are assigned to provider groups of the manager selected in the logged on user's personalization settings.
Services Agent Dashboard Page HelpDesk Agent Dashboard Page HR HelpDesk Agent Dashboard Page Service Center Agent Dashboard Page	(not applicable)	Access the Agent Dashboard to view information and take actions regarding cases that are owned by agents.

Note: The HR HelpDesk Manager Dashboard page and HR HelpDesk Agent Dashboard page have been replaced in Fluid. For more information, see [Using the PeopleSoft Fluid User Interface for the HR HelpDesk Dashboard](#).

Common Elements Used In This Section

<i>Field or Control</i>	<i>Description</i>
 (Refresh)	Click to refresh data display on the corresponding pagelet. Or, press the F5 key or the refresh button of the web browser to refresh all pagelets in the entire dashboard. Note: Refresh the dashboards for the latest operational data to be displayed.

Field or Control	Description
 (Personalize)	Click to personalize settings of the corresponding pagelet. The same options are also available on the User Preferences - Call Center page. When you make changes here, the changes are reflected in the pagelet display as well as the User Preferences component. The system delivers these pages to personalize individual dashboard pagelets: Important! Oracle highly recommends that you specify your personalization options and values for all pagelets so they can display information that pertains to your job area. • Personalize Case Arrivals versus Closures (RC_ARRIVAL_PRS) • Personalize Cases at Risk of Exceeding SLA (RC_SLARISK_PRS) • Personalize Manager Case Backlog (RC_BACKLOG_MGR_PRS) • Personalize Agent Case Backlog (RC_BACKLOG_AGT_PRS) • Personalize My Open Case SLA Status (RC_MYSLA_PRS) • Personalize Top Solutions By Category (RC_SOLCAT_PRS) The system prepopulates the fields with the corresponding values that are defined on the User Preferences - Call Center page for the logged on user. • Personalize Top Solutions By Product (RC_SOLBYPROD_PRS) The system prepopulates the fields with the corresponding values that are defined on the User Preferences - Call Center page for the logged on user. • Personalize Top Solutions By Library (RC_SOLLIB_PRS) The system prepopulates the fields with the corresponding values that are defined on the User Preferences - Call Center page for the logged on user. See “Call Center Page” (Application Fundamentals).
 (Minimize) and  (Expand)	Click to toggle between collapsing and expanding the corresponding pagelet.

Field or Control	Description
 (Remove)	Click to remove the corresponding pagelet from the dashboard. Use the Content link on the PIA home page to add back deleted pagelets.
View By	Select how the case information should be filtered and displayed on pagelets with bar charts, by status, priority, or predefined time frame.
ID	Click the solution ID link to view the solution detail in a modal secondary page.

Working with the Manager Dashboard

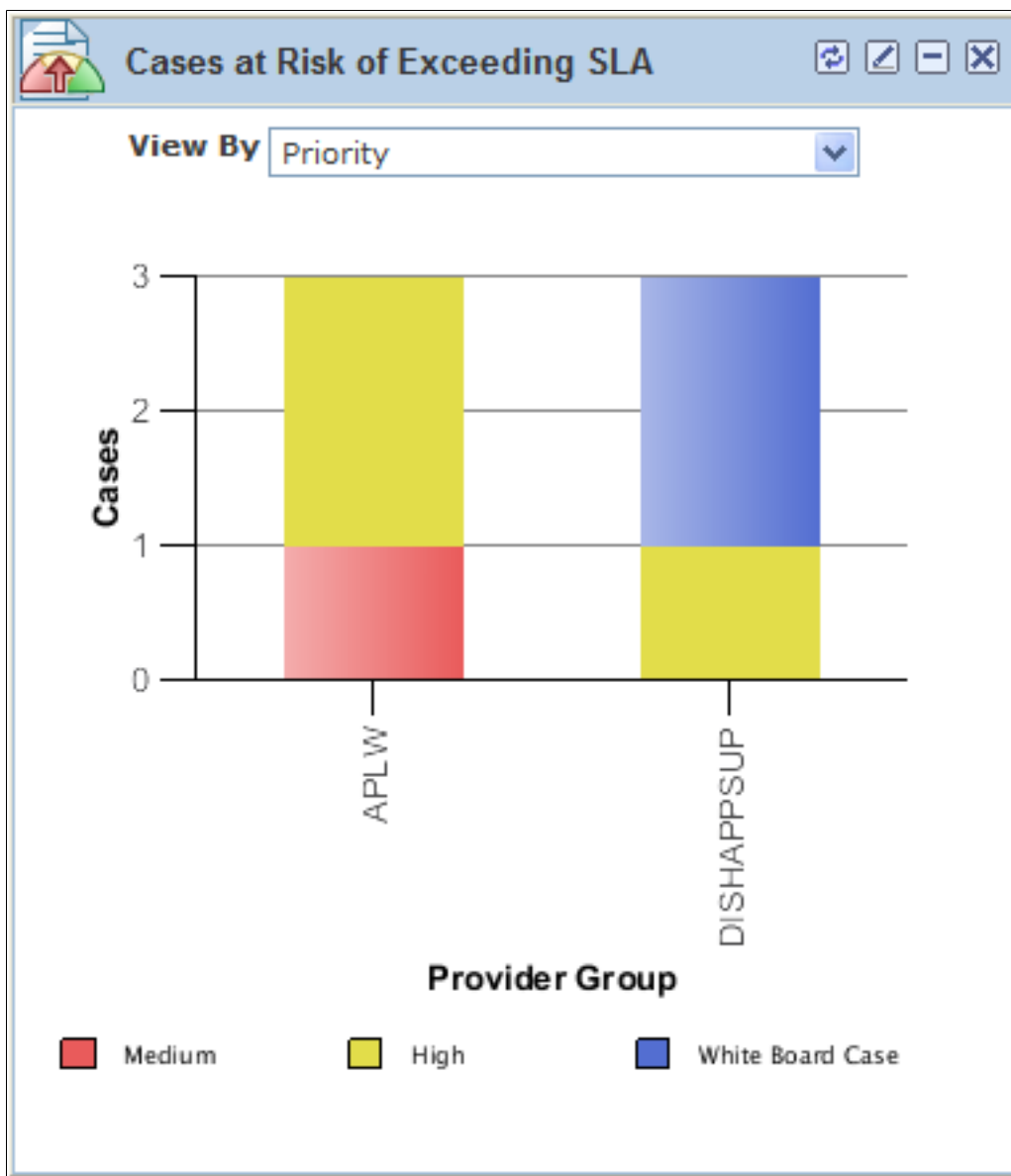
Access the Services Manager Dashboard page (Services Manager Dashboard).

Cases at Risk of Exceeding SLA Pagelet (RC_SLAEXCEED_PLT)

This pagelet displays the number of cases, which are assigned to provider groups of the manager selected in the logged on user's personalization settings, that are at risk of missing or already missing their SLAs. In the CRM system, a case is considered at risk of exceeding its SLA when its yellow date and time is about to pass or have passed, or *exceeding its SLA* when its red date and time is about to pass or have passed. A yellow or a red date and time refers to the restore time of a case that is running the risk of failing to meet its SLA. The restore time of a case is calculated based on the entitlements of the agreement that the case associates with. The calculation takes into account the service level selected on the agreement and the holiday schedule. When you save a case with an agreement selected, the restore time is computed and populated on the More tab of the Case page. As an administrator, you can configure the system to alert agents and managers of cases that are at risk of not meeting SLAs. Enable the **Percent of SLA for Red** and **Percent of SLA for Yellow** options on the Business Unit - Options page and enter the percentages of case restore time that has elapsed for the system to turn an unresolved case to red (exceeds SLA) and yellow (at risk of exceeding SLA) statuses. For example, the restore time of a newly saved case is set to 10 hours from now. If the SLA for red and SLA for yellow are set at 90 and 50 percents of the case restore time, the system turns the unresolved case to the yellow state in five hours and the red state in nine hours. As delivered, the restore dates and times for the red state and yellow state are enabled for display on Support cases.

Managers can use information provided in this pagelet to identify provider groups and agents who are struggling to meet customer SLA commitments. They see how these cases are allocated among provider groups by status and priority. With this data, they can take actions, such as reassigning cases, to balance the workload of each of their provider groups.

This example illustrates the fields and controls on the Cases at Risk of Exceeding SLA pagelet in Manager Dashboard.

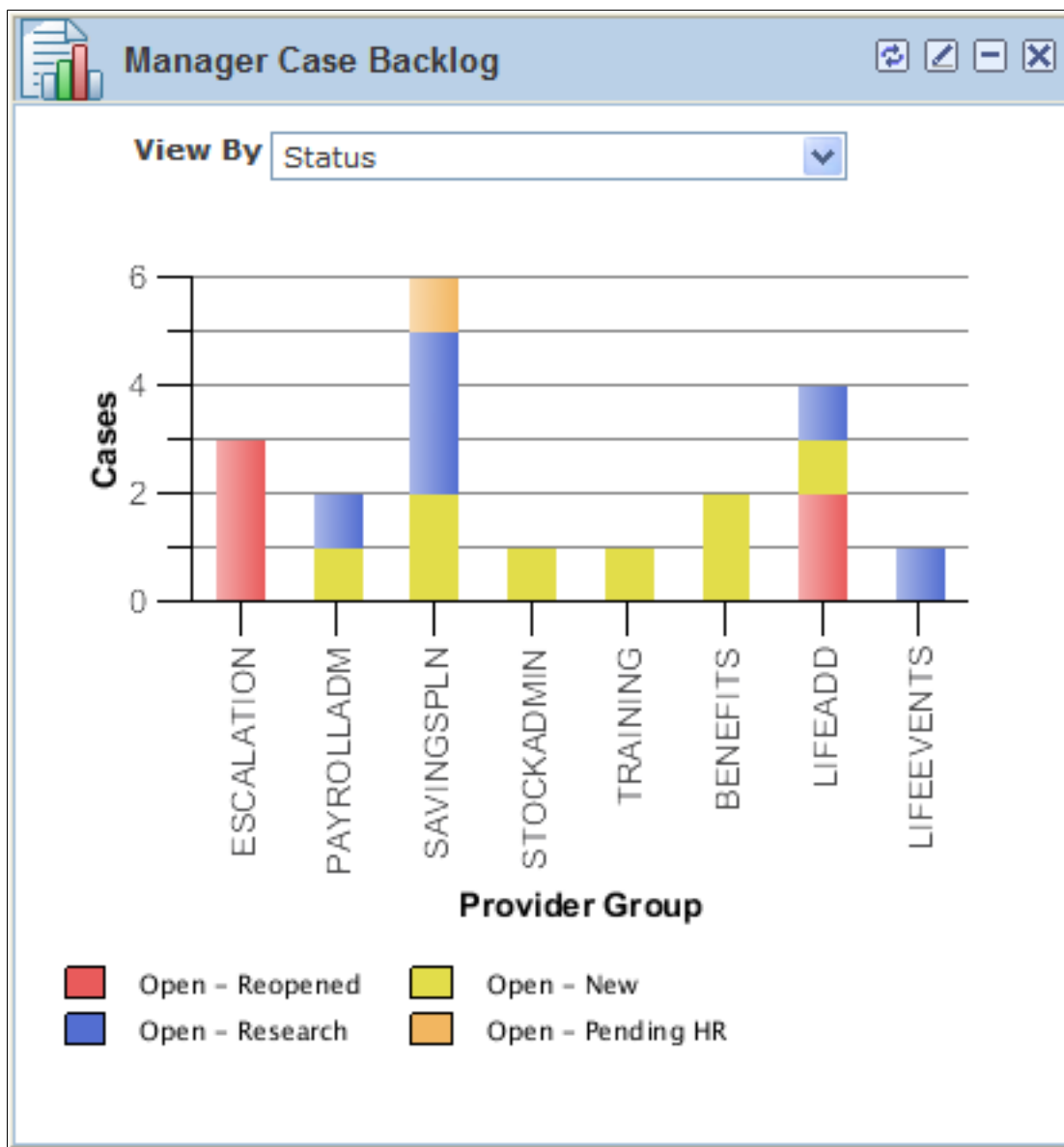


Note: Case priority is not a required field in cases; for cases that do not have this value specified, they are represented in bar chart pagelets using the *No Priority* legend.

Manager Case Backlog Pagelet (RC_BACKLOG_MGR_PLT)

This pagelet displays the number of open cases that are assigned to provider groups of the logged on manager, by priority or status.

This example illustrates the fields and controls on the Manager Case Backlog pagelet in Manager Dashboard.

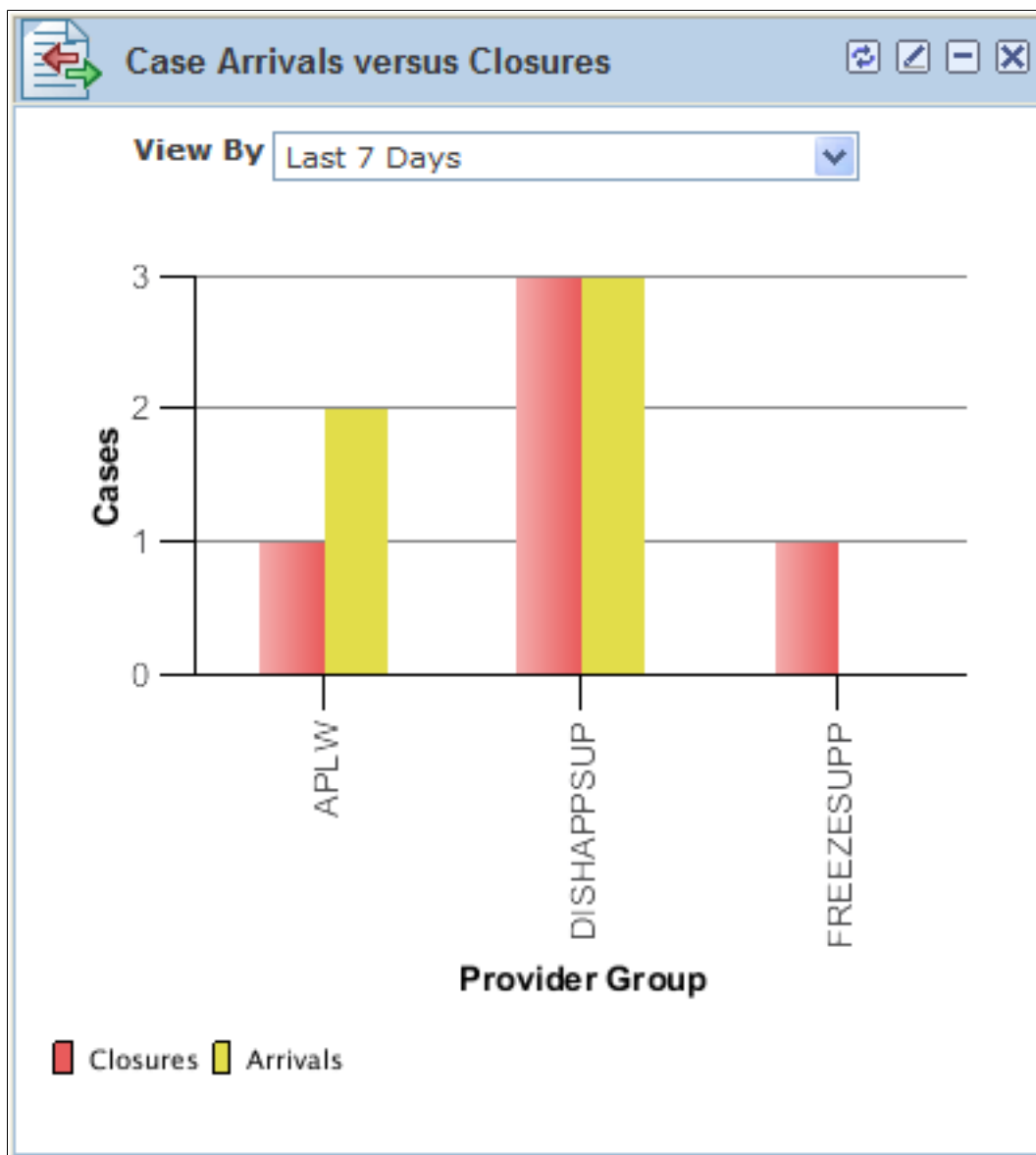


Case Arrivals Versus Closures Pagelet (RC_ARRIVAL_PLT)

This pagelet displays the numbers of new cases and closed cases that are assigned to provider groups of the manager selected in the logged on user's personalization settings. Managers can choose the time range for which the information is presented: for the past day, the past seven days, or the past 30 days. The pagelet provides a side-by-side comparison of the numbers, giving managers an idea of how each provider group is doing in terms of workload and availability.

The data on case arrivals and case closures, as shown on this pagelet, is based on the case created date and case closed date (viewable in the Audit History section of cases).

This example illustrates the fields and controls on the Case Arrivals versus Closures pagelet in Manager Dashboard.



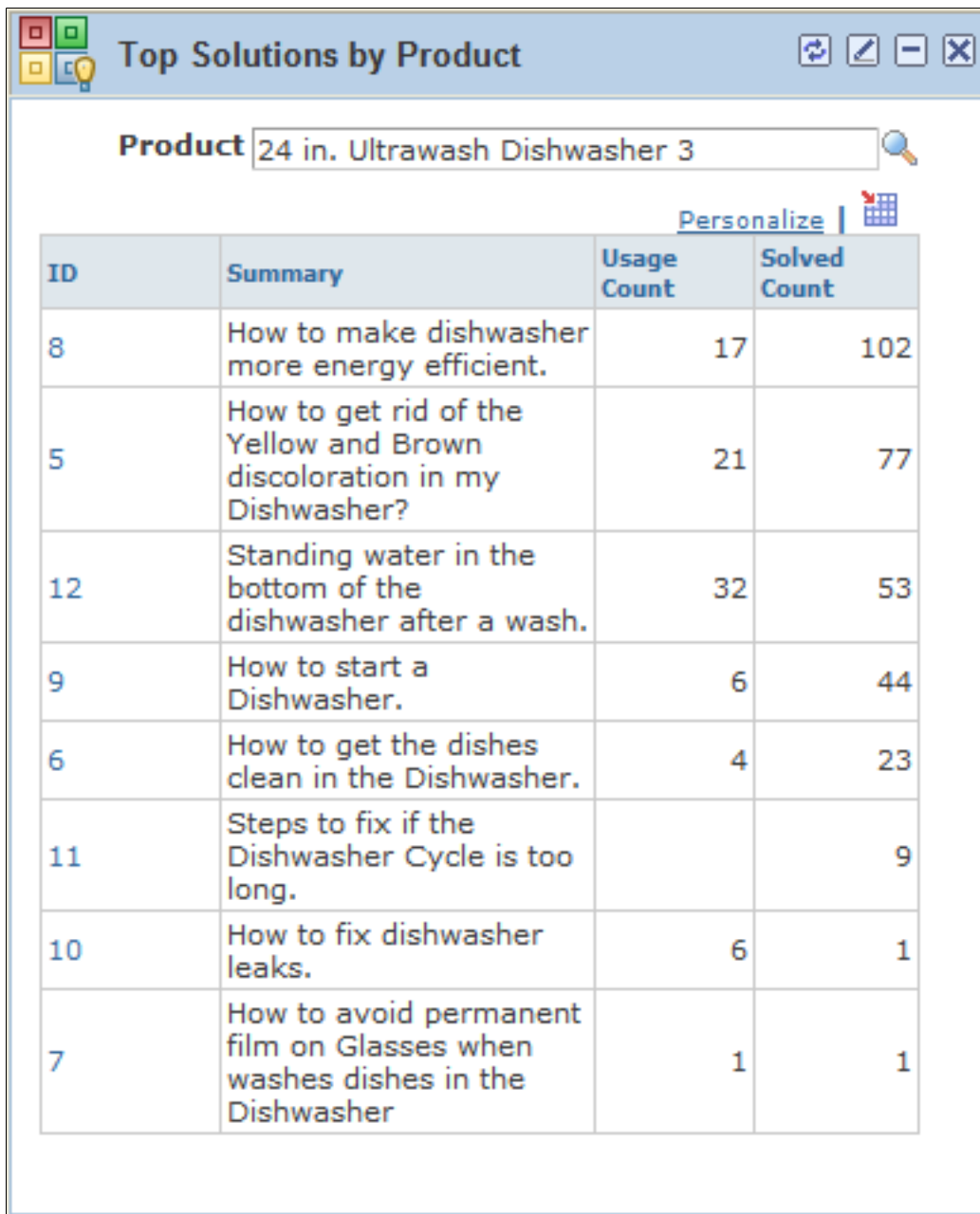
Top Solutions by Product Pagelet (RC_SOLPROD_PLT)

This pagelet lists the top ten most frequently used solutions to resolve cases created for the specified product. Solutions with the highest solved counts appear first, followed by those with the highest usage counts, and the most recently used.

Only active, non-adhoc type solutions are eligible for display on this pagelet.

Solutions are associated with products on the Related Actions page on the Solution component.

This example illustrates the fields and controls on the Top Solutions by Product pagelet in Manager and Agent Dashboards.



ID	Summary	Usage Count	Solved Count
8	How to make dishwasher more energy efficient.	17	102
5	How to get rid of the Yellow and Brown discoloration in my Dishwasher?	21	77
12	Standing water in the bottom of the dishwasher after a wash.	32	53
9	How to start a Dishwasher.	6	44
6	How to get the dishes clean in the Dishwasher.	4	23
11	Steps to fix if the Dishwasher Cycle is too long.		9
10	How to fix dishwasher leaks.	6	1
7	How to avoid permanent film on Glasses when washes dishes in the Dishwasher	1	1

Note: As delivered, the Top Solutions by Product pagelet is not displayed on HR HelpDesk dashboard pages as product groups and products are not enabled in display templates for use in HR HelpDesk cases. However, if you have these fields enabled for HRHD cases, you can make this pagelet available on both dashboards to view top solutions that are filtered by products.

Field or Control	Description
Product	Select the name of the product by which the solution list is filtered. The system populates the default value of this field that is specified on the Call Center page of the User Preferences component. See “Call Center Page” (Application Fundamentals).

Top Solutions by Library Pagelet (RC_SOLLIB_PLT)

This pagelet lists, for the specified library, the top ten most frequently used solutions to resolve cases. Solutions with the highest solved counts appear first, followed by those with the highest usage counts, and the most recently used.

Only active, non-adhoc type solutions are eligible for display on this pagelet.

This example illustrates the fields and controls on the Top Solutions by Library pagelet in Manager and Agent Dashboards.

 Top Solutions by Library     			
Library Academic Affairs 		Personalize 	
ID	Summary	Usage Count	Solved Count
301362	Why can't I register for classes?	702	687
301363	How do I appeal a grade?	278	276
301364	What are the general policies regarding transferring courses?	180	174
301365	What is Cooperative Education?	187	112
301366	What should I talk about with my major advisors?	143	37
301367	When will diplomas be distributed?	31	29

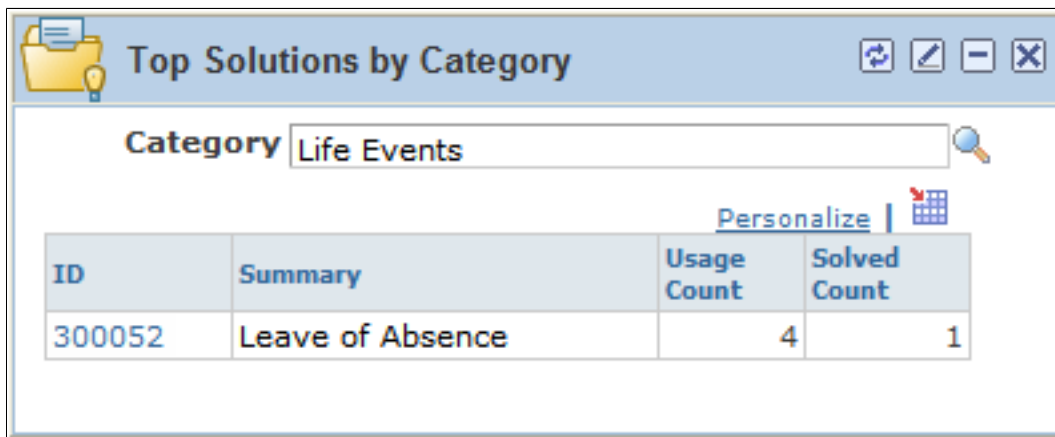
Top Solutions by Category Pagelet (RC_SOLCAT_PLT)

This pagelet lists, for the specified case category, the top ten most frequently used solutions to resolve cases. Solutions with the highest solved counts appear first, followed by those with the highest usage counts, and the most recently used.

Only active, non-adhoc type solutions are eligible for display on this pagelet.

Solutions are associated with case categories on the Related Actions page on the Solution component.

This example illustrates the fields and controls on the Top Solutions by Category pagelet in Manager and Agent Dashboards.



ID	Summary	Usage Count	Solved Count
300052	Leave of Absence	4	1

Related Links

[Business Unit - Options Page](#)

Working with the Agent Dashboard

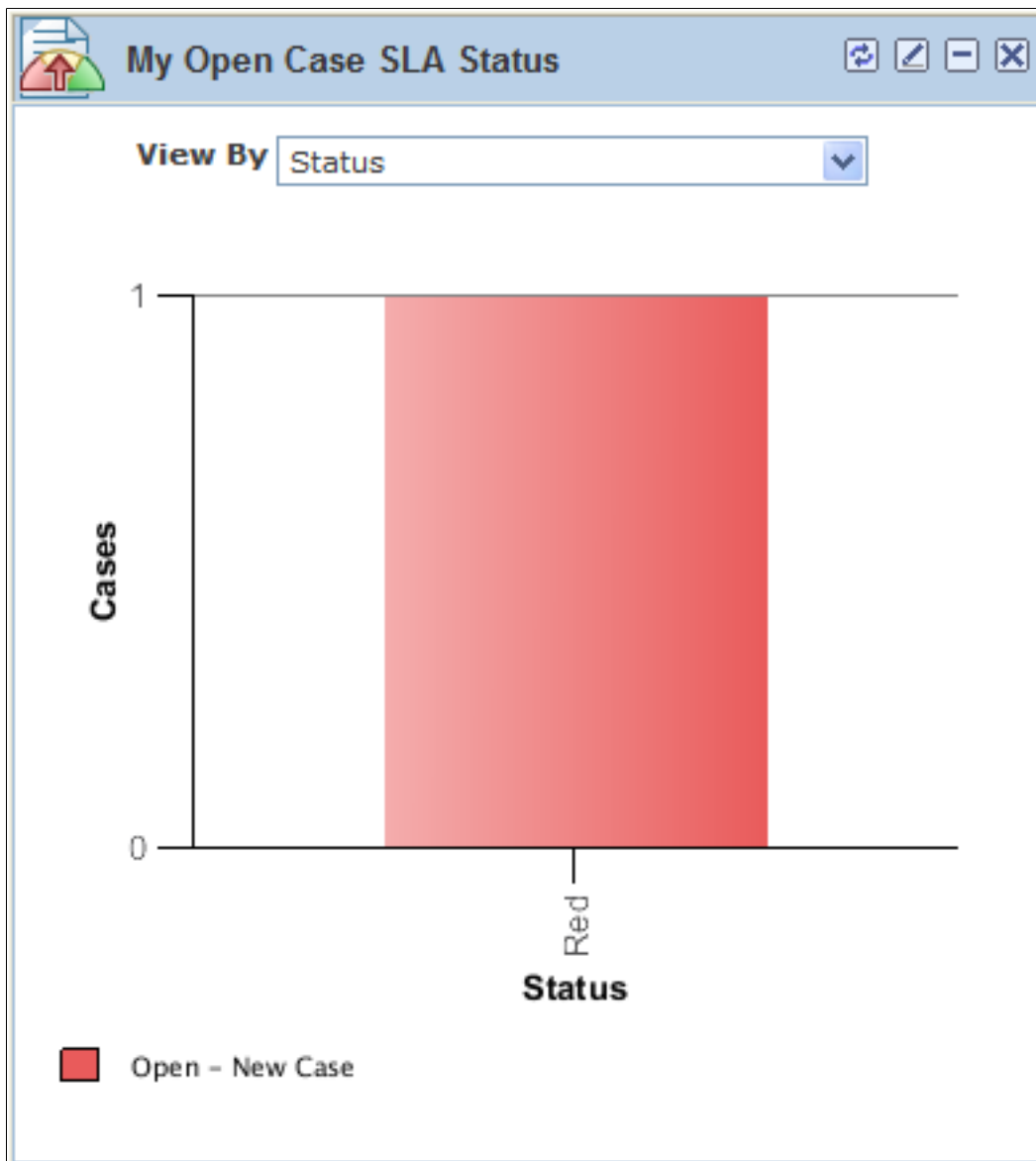
Access the Services Agent Dashboard page (Services Agent Dashboard).

My Open Case SLA Status Pagelet (RC_MYSLA_PLT)

This pagelet displays, for the logged on agent, all of his or her open cases that are at risk of missing or already missing their SLAs. Agents can use information provided in this pagelet to identify cases that need immediate attention. Data on this pagelet can be viewed by case status or priority.

Refer to the **Cases at Risk of Exceeding SLA Pagelet** section for more information on how the system determines cases that are at risk of exceeding or already exceeding SLAs.

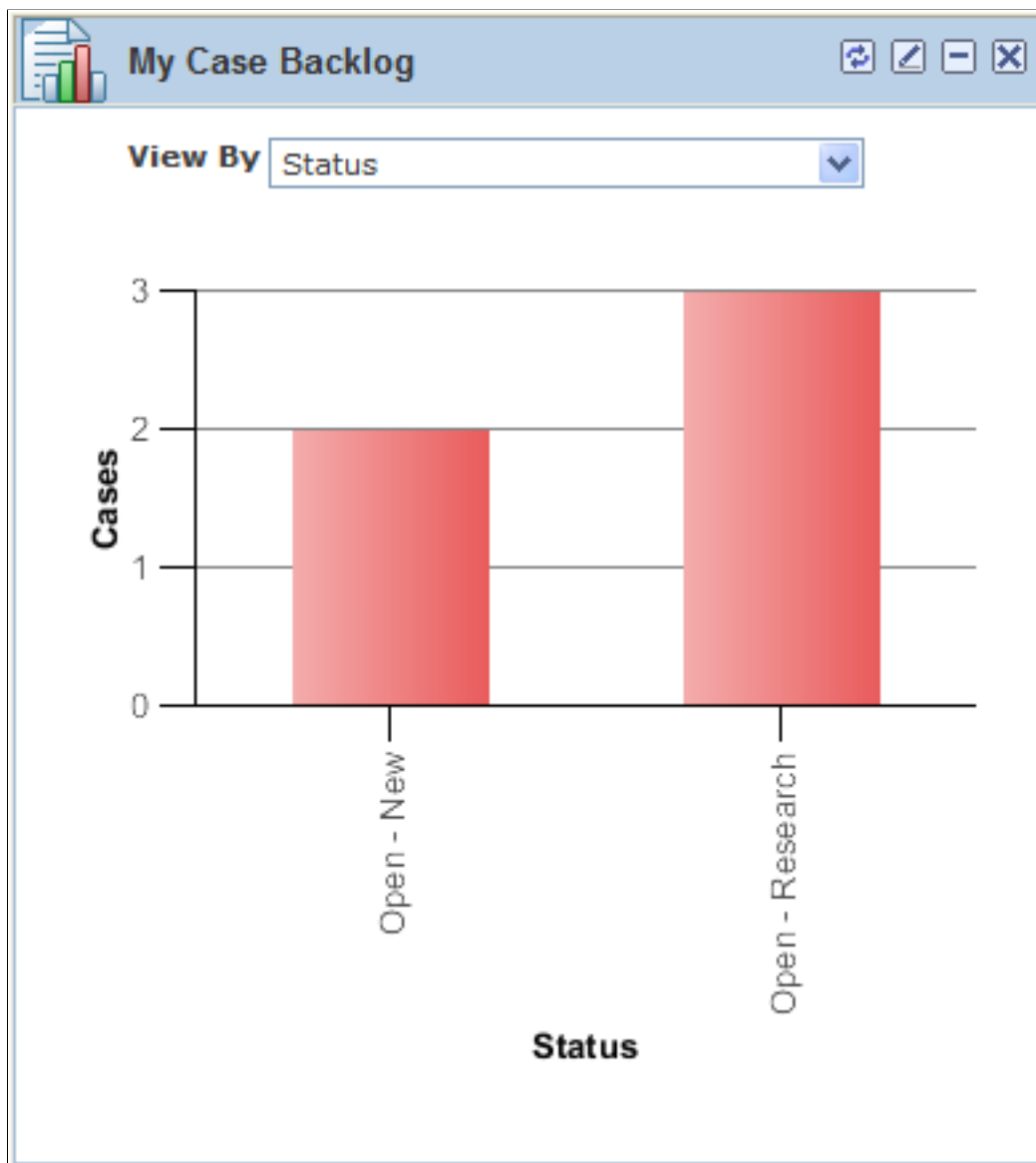
This example illustrates the fields and controls on the My Open Case SLA Status pagelet in Agent Dashboard.



My Case Backlog Pagelet (RC_BACKLOG_AGT_PLT)

This pagelet displays the number of open cases that are assigned to the logged on agent. Data on this pagelet can be viewed by case status or priority.

This example illustrates the fields and controls on the My Case Backlog pagelet in Agent Dashboard.



Note: Case priority is not a required field in cases; for cases that do not have this value specified, they are represented in bar chart pagelets using the *No Priority* legend.

Agent - My Cases Pagelet (RC_AGT_CASES_PGT_W)

Similar to the My Case Backlog pagelet, this pagelet displays open cases that are currently assigned to the logged on agent. In this pagelet, case information is presented in a grid, allowing agents to sort cases by column headings and prioritize their cases based on, for example, customer, case summary, case creation date, priority, status, or entitled restore date and time. Click a case ID link to open and edit the case in a browser window or tab.

Delivered views are available in this pagelet for agents to filter cases that they are interested in:

- All of my cases that were modified in the past 30 days.
- All of my cases that were modified in the past 7 days.

- All of my open cases.
- All unassigned cases in my provider group.

Through this view, agents can review and cherry-pick unassigned cases to work on based on their skills and availability.

In addition, agents can add new cases (created using case default values that are specified for agent's business unit) and search existing cases (associated with agent's business unit) from this pagelet.

This example illustrates the fields and controls on the Agent - My Cases pagelet in Agent Dashboard.

Agent - My Cases

View: All my open cases

First 1-5 of 5 Last

Main More

Case ID	Customer	Status	Priority
220525	Antonio Santos	Open - New	Medium
220412	Antonio Santos	Open - Research	Medium
220408	David Cole	Open - Research	Medium
220406	David Cole	Open - Research	Medium
220339	Carol Hamilton	Open - New	Medium

[Add Case](#) [Search Cases](#) Case ID

Top Solutions by Product Pagelet

This pagelet lists the top ten solutions that are most frequently used to resolve cases created for the specified product.

See Working with the Manager Dashboard

Top Solutions by Library Pagelet

This pagelet lists, for the specified library, the top ten solutions that are most frequently used to resolve cases.

See Working with the Manager Dashboard

Top Solutions by Category Pagelet

This pagelet lists, for the specified case category, the top ten solutions that are most frequently used to resolve cases.

See Working with the Manager Dashboard

Using the PeopleSoft Fluid User Interface for the HR HelpDesk Dashboard

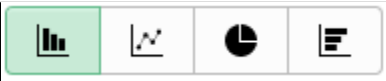
The PeopleSoft Fluid User Interface HR Helpdesk Dashboard feature delivers a dashboard page that managers or agents can view on a tablet or mobile device to access pivot-based analytics for operational data reporting. Multiple pivot-based analytics are delivered as individual tiles on this dashboard page. Managers viewing the dashboard page have access to analytics available to the HR Helpdesk manager role while HR Helpdesk agents have access to only tiles displaying information at the agent’s level.

Analytics in the form of pivots help HR Helpdesk managers and agents to see summarized information on case entries. They can also drill down to specific set of records. Users can also perform related actions like notify case contact or agents, view contact info, add notes, and reassign cases.

Note: The PeopleSoft Fluid User Interface enhancements are available from PeopleSoft CRM Call Center Applications release 9.2. For more information on PeopleSoft Fluid User Interface see “Understanding the PeopleSoft Fluid User Interface” (Enterprise Components)

Common Elements Used in this Topic

Elements	Description
 Option Menu	Tap to perform actions like View Pivot Grid, Update Filters, Export Data, Chart Options, and Save.
 Show Filters	Tap Show Filters on the left panel to display filters. The filters available in the Manager Dashboard are SLA Category, Priority, Provider Group, Source, Product Group, Case Severity, Case Type, Case Status (Status Category), Secured Cases, Escalated Cases, and Global Cases. The filters available for Agent Dashboard are Provider Group, Case Type, Category, and Business Unit.
 Hide Filters	Tap to hide the filters.

Elements	Description
 Pivot Grid Chart Types	Tap to display data in the chart type represented by the icon. Available chart types include vertical bar, line, pie, and horizontal bar.
 Related Actions (Displayed in the Grid)	Tap and perform actions related to the case, such as Notify, View Contact Info, Add Notes, and Reassign Cases.

For more information on pivot grid functionality, see the product documentation for *PeopleTools: Pivot Grid*.

Using the PeopleSoft Fluid HR Helpdesk - Manager Analytics

Using the Fluid HR Helpdesk - Manager Dashboard page, managers can access a set of analytics which helps to monitor agent efficiency, gain insight into case SLA status and analyze service response activity of the team members.

Logging onto the HR Helpdesk - Manager Dashboard page, a manager can view the following tiles:

- Manager Case Backlog tile.
- Manager Case Age Analysis by Category tile.
- Case Arrival vs. Closure tile.

Pages Used to Perform Analytics as a Manager

Page Name	Definition Name	Usage
<u>Manager Case backlog Tile</u>	CR_RC_PG_MGR_BLOG_FL_GBL	Tap this tile to access the Manager Case Backlog page.
<u>Manager Case Backlog Page</u>	RC_PG_MGR_BLOG_LFL	To view a pivot chart for the team's case backlog and view details of the cases.
<u>Case Age Analysis by Category Tile</u>	CR_RC_PG_M_CASE_AG_FL_GBL	Tap this tile to access the Case Age Analysis by Category page.
<u>Case Age Analysis by Category Page</u>	RC_PG_M_CASE_AG_LFL	To view case age distribution of Open and On Hold Cases for a particular Category (as a default view) against age bands defined for the respective Category definition.

Page Name	Definition Name	Usage
<u>Case Arrival vs. Closure Tile</u>	CR_RC_PG_M_ARR_CLSR_FL_GBL	Tap this tile to access the Case Arrival vs. Closure page.
<u>Case Arrival vs. Closure Page</u>	RC_MGR_ARR_CLS_LFL	To view case arrivals compared to case closures over time during the same time frame.

Manager Case backlog Tile

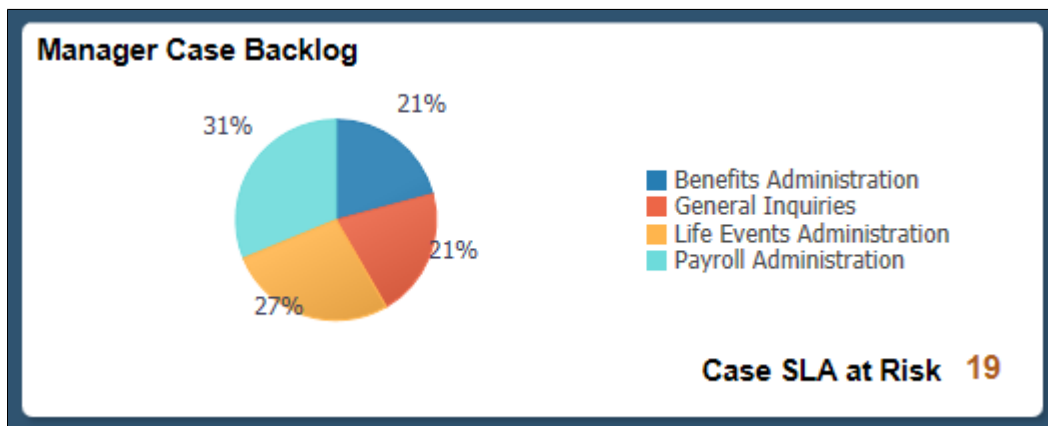
The Manager Case Backlog tile (CR_RC_PG_MGR_BLOG_FL_GBL) displays live chart data for the manager's current case backlog. The tile also displays the count of all open (Open and On Hold) cases for the team of Provider Groups which are in red SLA status.

Tap the Manager Case Backlog tile to access the Manager Case Backlog page.

Navigation:

Select Fluid Home under the main menu. The Manager Case Backlog tile is available in the Manager Dashboard page.

This example illustrates the Manager Case Backlog tile.



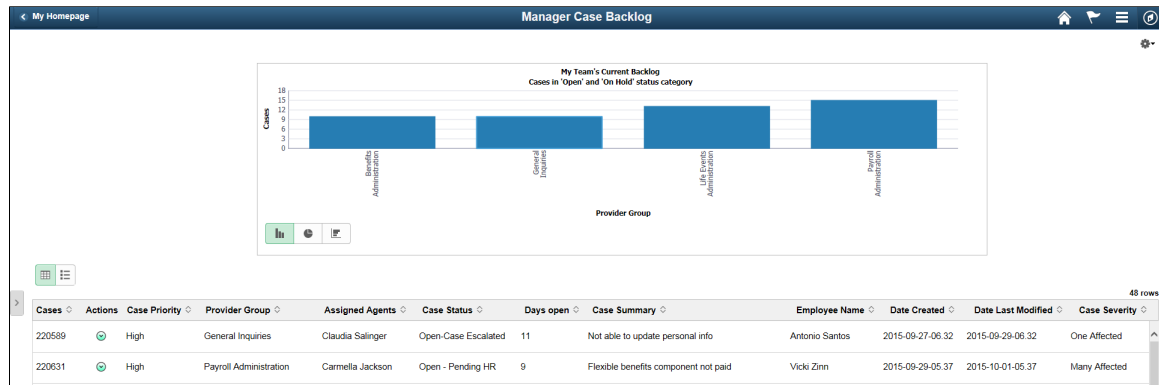
Manager Case Backlog Page

Use the Manager Case Backlog page (RC_PG_MGR_BLOG_LFL) to view an interactive pivot chart for the team's case backlog and the count of case SLAs at risk.

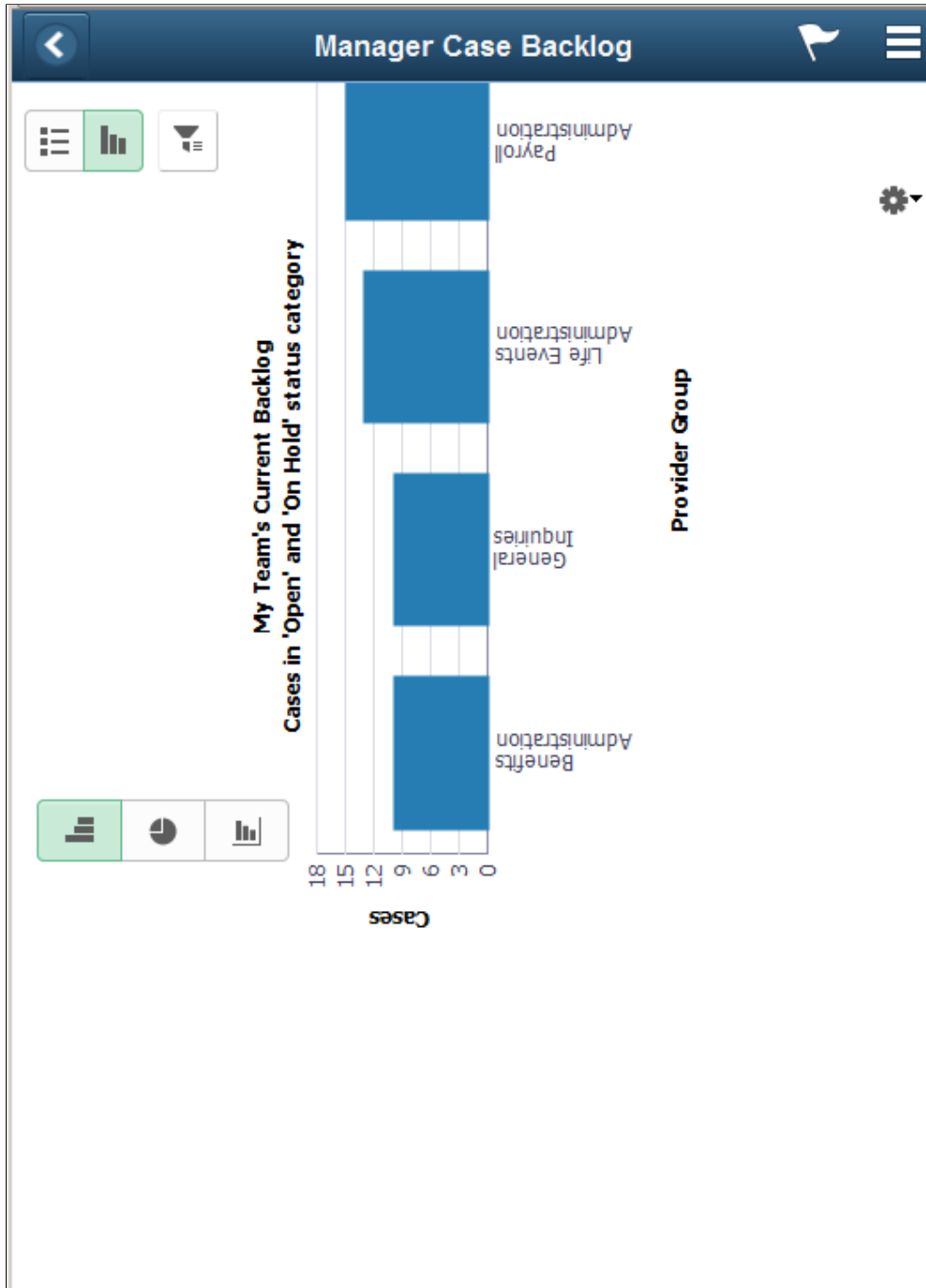
Navigation:

Tap the Manager Case Backlog tile on the Manager Dashboard page.

This example illustrates the fields and controls on the Manager Case Backlog page using a tablet.



This example illustrates the fields and controls on the Manager Case Backlog page using a smartphone.



Case Age Analysis by Category Tile

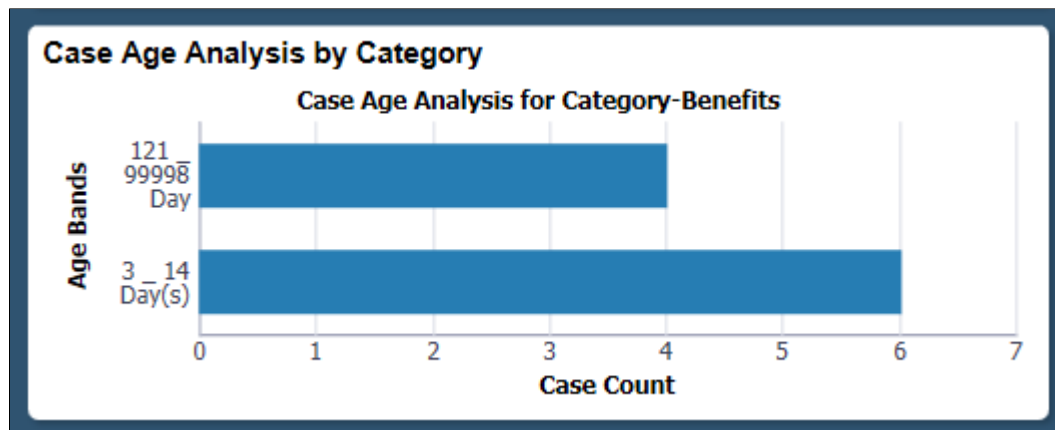
The Case Age Analysis by Category tile (CR_RC_PG_M_CASE_AG_FL_GBL) displays live chart data for case age analysis by category. By default, the chart shows the case age distribution based on age bands for a particular category.

Tap the Case Age Analysis by Category tile to access the Case Age Analysis by Category page.

Navigation:

Select Fluid Home under the main menu, the Case Age Analysis by Category tile is available in the Manager Dashboard page.

This example illustrates the Case Age Analysis by Category tile.



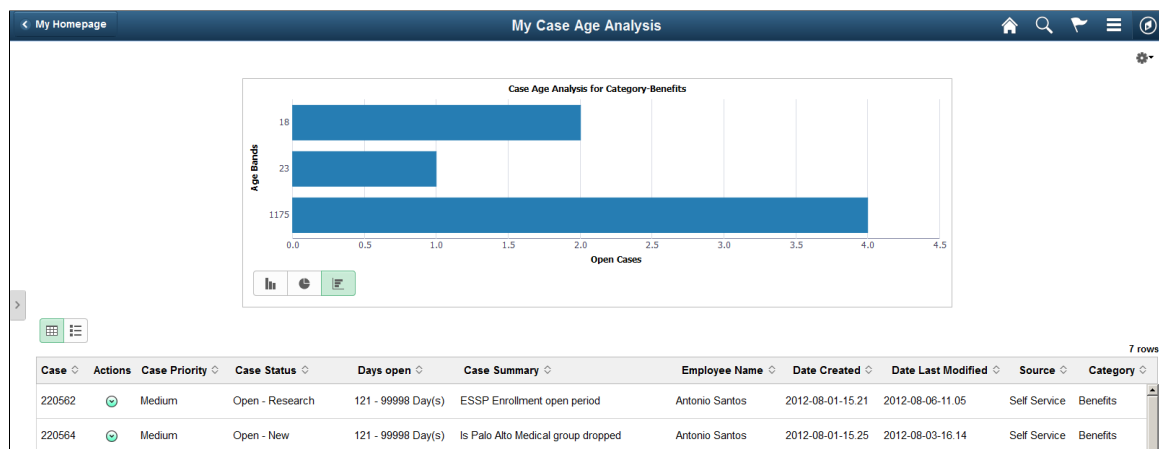
Case Age Analysis by Category Page

Use the Case Age Analysis by Category page (RC_PG_M_CASE_AG_LFL) to view case age distribution of Open and On Hold Cases for a particular category (as a default view) against age bands defined for that category. The view can be modified by using drill downs to display case counts by status, source etc within each age band.

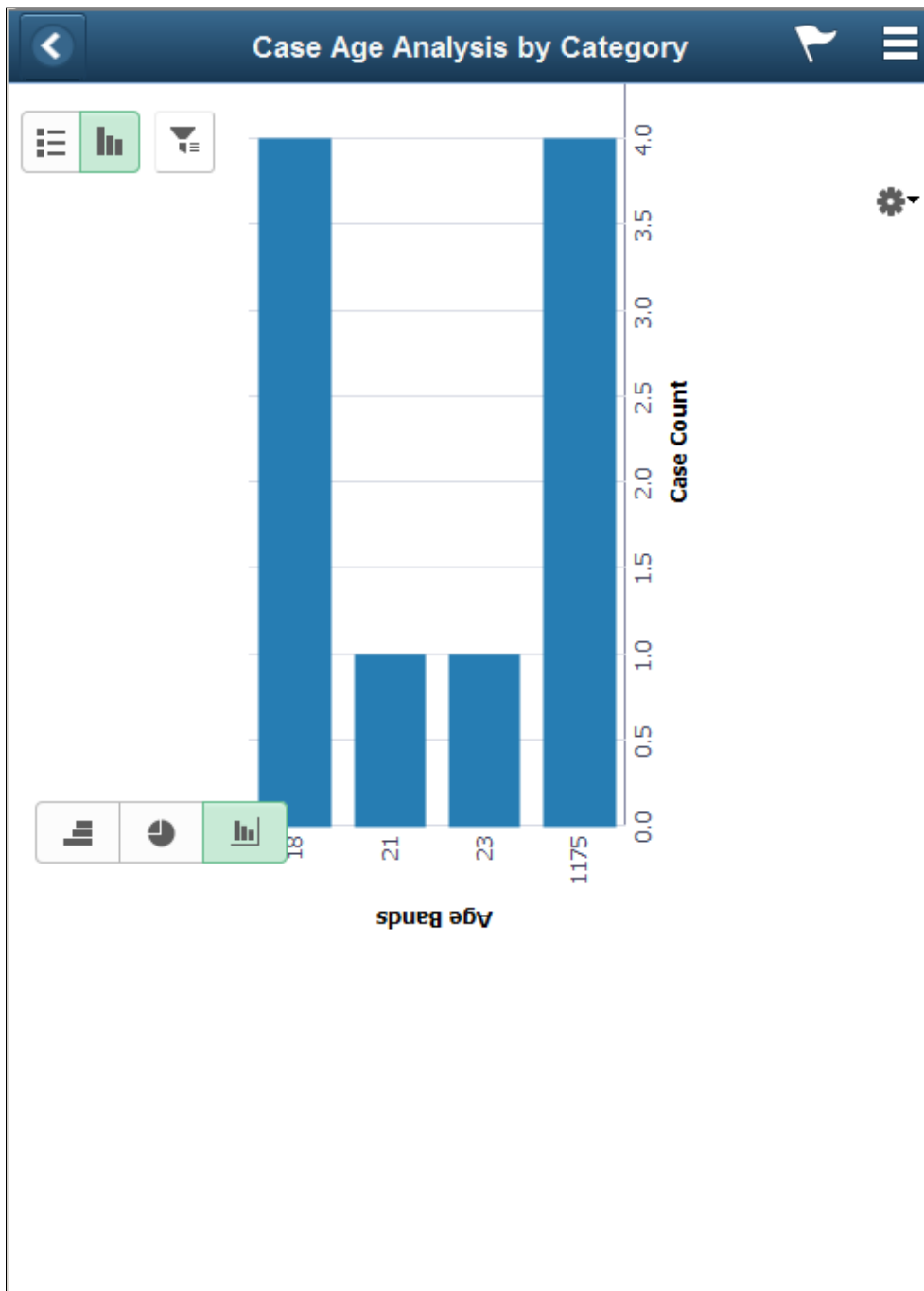
Navigation:

Tap the Case Age Analysis by Category tile on the Manager Dashboard page.

This example illustrates the fields and controls on the Case Age Analysis by Category page using a tablet.



This example illustrates the fields and controls on the Case Age Analysis by Category page using a smartphone.



Case Arrival vs. Closure Tile

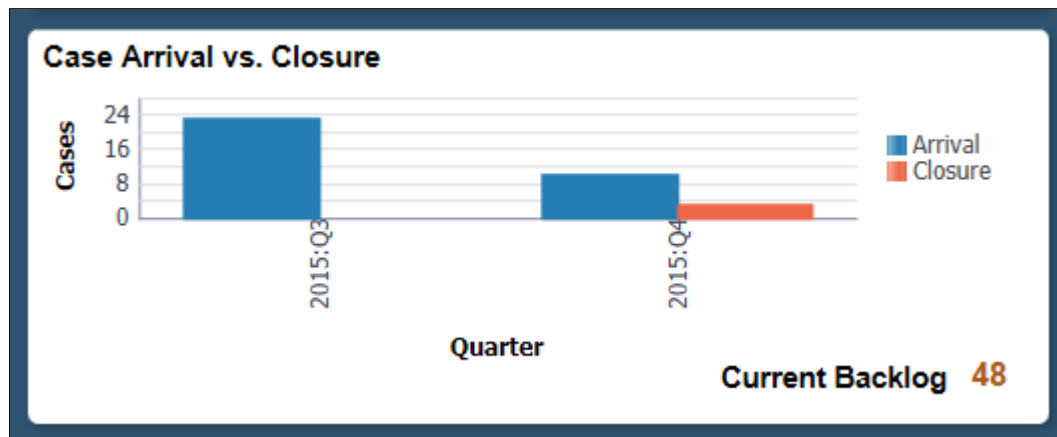
The Case Arrival vs. Closure tile (CR_RC_PG_M_ARR_CLSR_FL_GBL) displays live chart data for case arrivals and cases closed. It also displays the current backlog, i.e. the overall count of open cases across all provider groups for the manager at the moment.

Tap the Case Arrival vs. Closure tile to access the Case Arrival vs. Closure page.

Navigation:

Select Fluid Home under the main menu, the Case Arrival vs. Closure tile is available in the Manager Dashboard page.

This example illustrates the Case Arrival vs. Closure tile.



Case Arrival vs. Closure Page

Use the Case Arrival vs. Closure page (RC_MGR_ARR_CLS_LFL) to view the volume of cases arrived vs. closed during a period of time (last 13 months to date is set as the default) for the team.

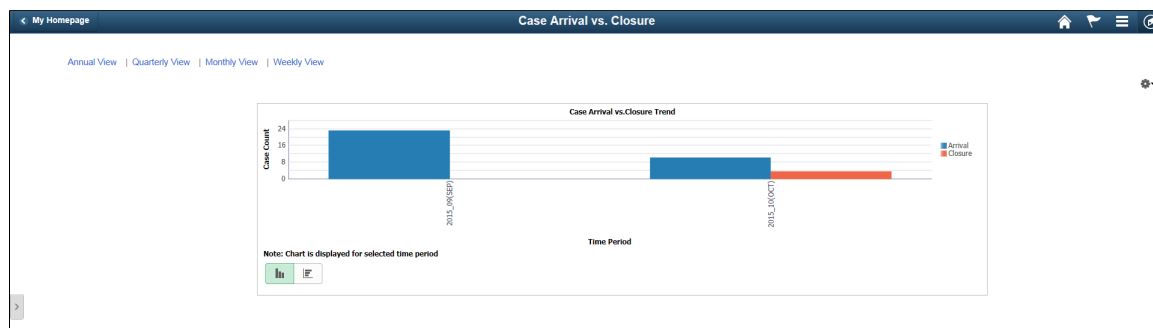
The Case Arrivals vs. Case Closure report assists the managers to analyze the spikes in call volume; drill to detail to understand the underlying cause of the case backlog, and make predictions regarding the volume of cases that will be closed in the future based on the current case closure trends.

Using this page the managers can also save the prompts for date range to view trend and view the trend by calendar year, quarter, month or week.

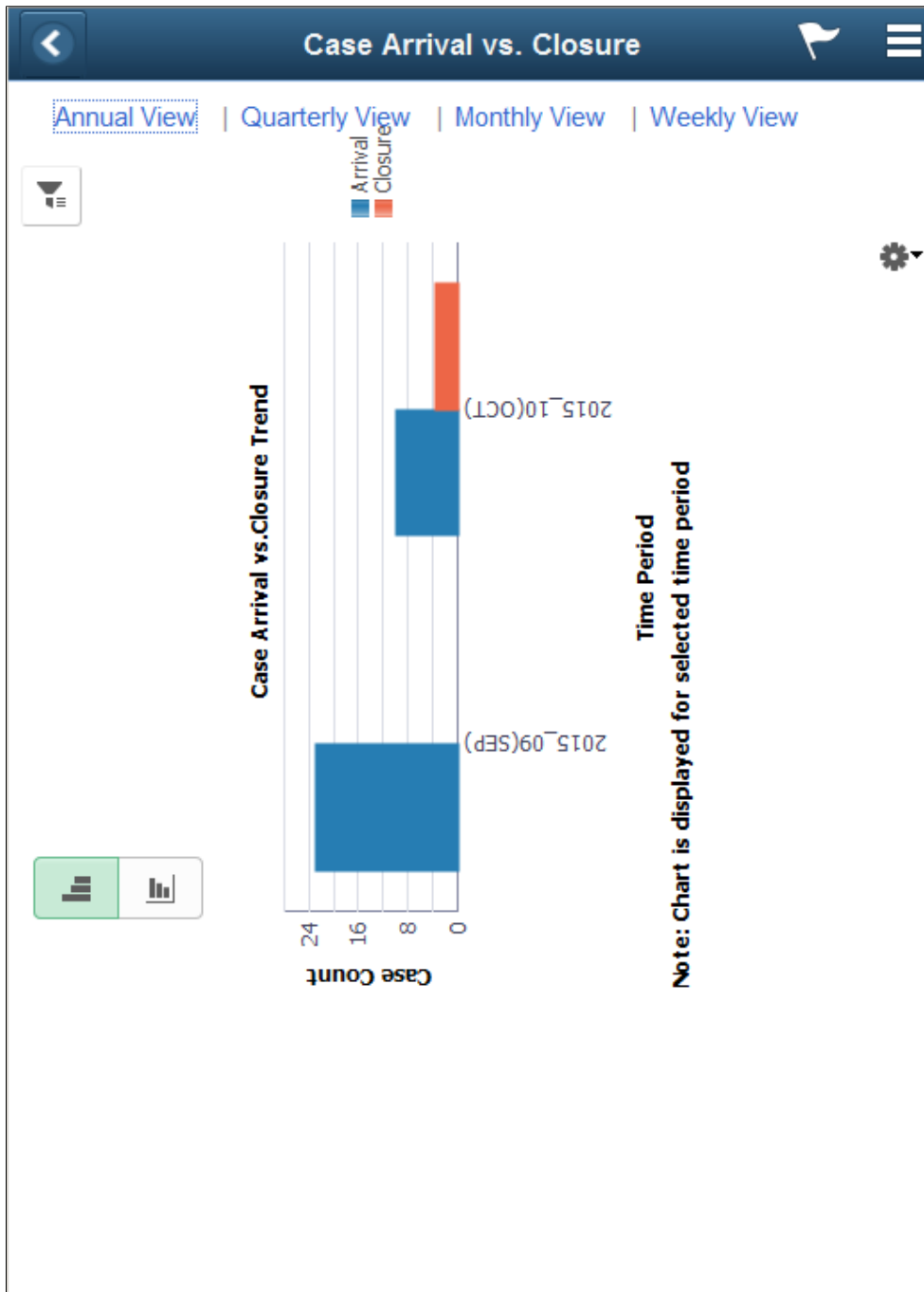
Navigation:

Tap the Case Arrival vs. Closure tile on the Manager Dashboard page.

This example illustrates the fields and controls on the Case Arrival vs. Closure page using a tablet.



This example illustrates the fields and controls on the Case Arrival vs. Closure page using a smartphone.



Using the PeopleSoft Fluid HR Helpdesk - Agent Analytics

Using the Fluid HR Helpdesk - Agent Dashboard page, agents can access a set of analytics which helps to assess their individual backlog and respective SLA status.

Logging onto the HR Helpdesk - Agent Dashboard page, an agent can view the following tiles:

- My Case Backlog tile
- My Case Age Analysis tile

- Case Arrival vs. Closure tile

Pages Used to Perform Analytics as an Agent

Page Name	Definition Name	Usage
<u>My Case Backlog Tile</u>	CR_RC_PG_AGT_BLOG_FL_GBL	Tap this tile to access the My Case Backlog page.
<u>My Case Backlog Page</u>	RC_PG_AGT_BLOG_LFL	To view an interactive pivot chart of the case backlog for an agent who has logged in.
<u>My Case Age Analysis Tile</u>	CR_RC_PG_A_CASE_AG_FL_GBL	Tap this tile to access the My Case Age Analysis page.
<u>My Case Age Analysis Page</u>	RC_PG_A_CASE_AG_LFL	To view an interactive pivot chart for an agent's open case backlog by category.
<u>Case Arrival vs. Closure Tile</u>	CR_RC_PG_A_ARR_CLSR_FL_GBL	Tap this tile to access the Case Arrival vs. Closure page.
<u>Case Arrival vs. Closure Page</u>	RC_AGNT_ARR_CLS_LFL	To view the number of open cases and the cases closed by the agent from different sources, for a particular time period. The initial view provides a concise summary of the case arrivals versus closure trends for the agent.

My Case Backlog Tile

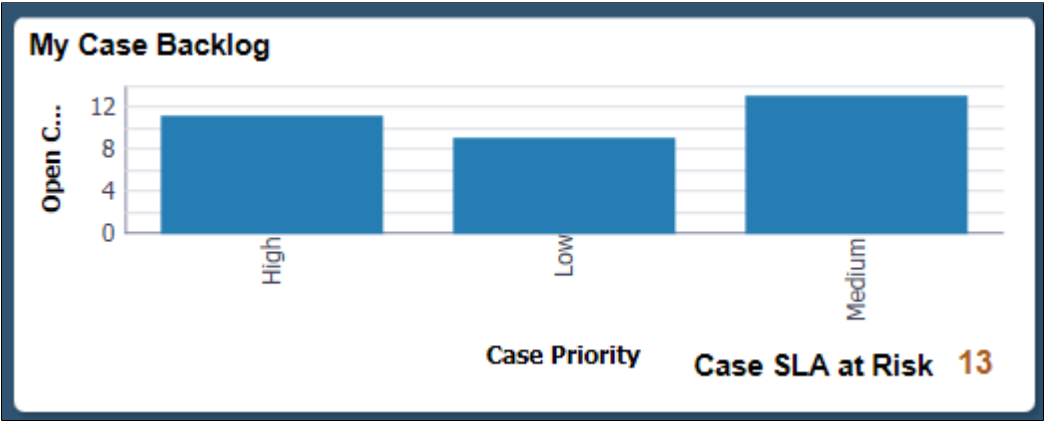
My Case Backlog tile (CR_RC_PG_AGT_BLOG_FL_GBL) displays live chart data for the agent's case backlog along with the count of all open (Open and On Hold) cases for him that are in the red SLA status.

Tap the My Case Backlog tile to access the My Case Backlog page

Navigation:

Select Fluid Home under the main menu, the My Case Backlog tile is available in the Agent Dashboard page.

This example illustrates the My Case Backlog tile.



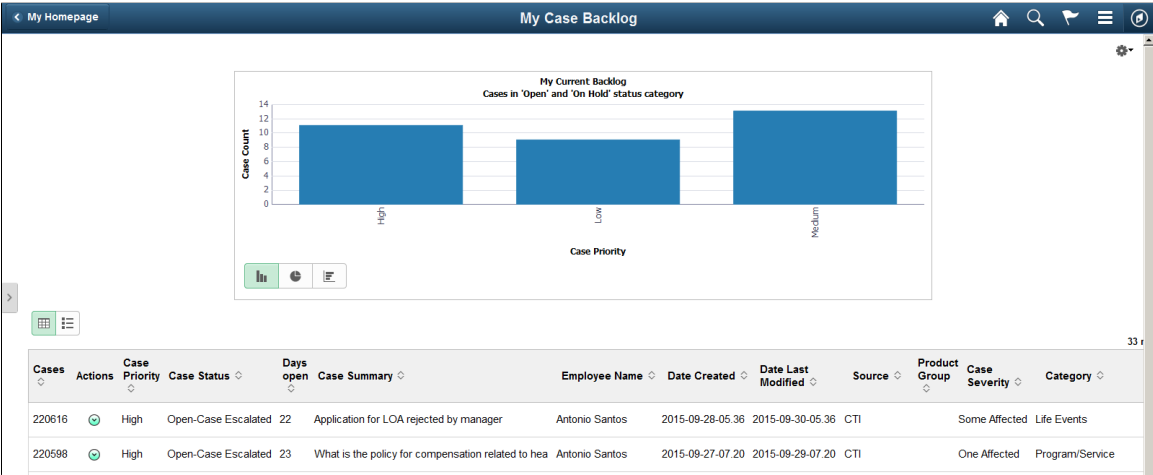
My Case Backlog Page

Use the My Case Backlog page (RC_PG_AGT_BLOG_LFL) to view an interactive pivot chart of the case backlog of the agent who has logged in. The breakdown of cases is presented by priority and SLA status in the default view. This enables the agent to prioritize and take action on the cases. The agent can also interact with the chart and modify the view by using various filters and drilldown options.

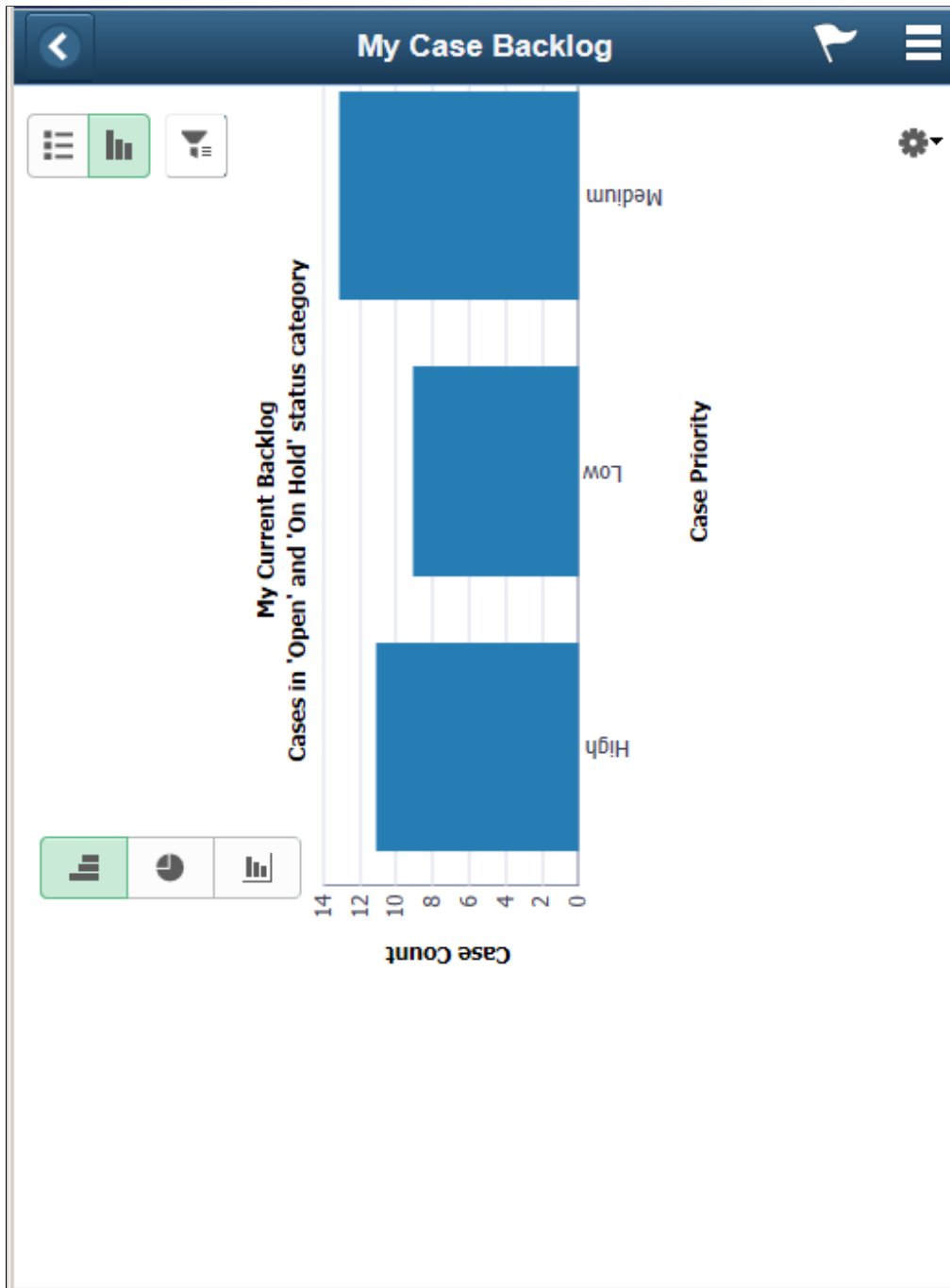
Navigation:

Tap the My Case Backlog tile on the Agent Dashboard page.

This example illustrates the fields and controls on the My Case Backlog page using a tablet.



This example illustrates the fields and controls on the My Case Backlog page using a smartphone.



My Case Age Analysis Tile

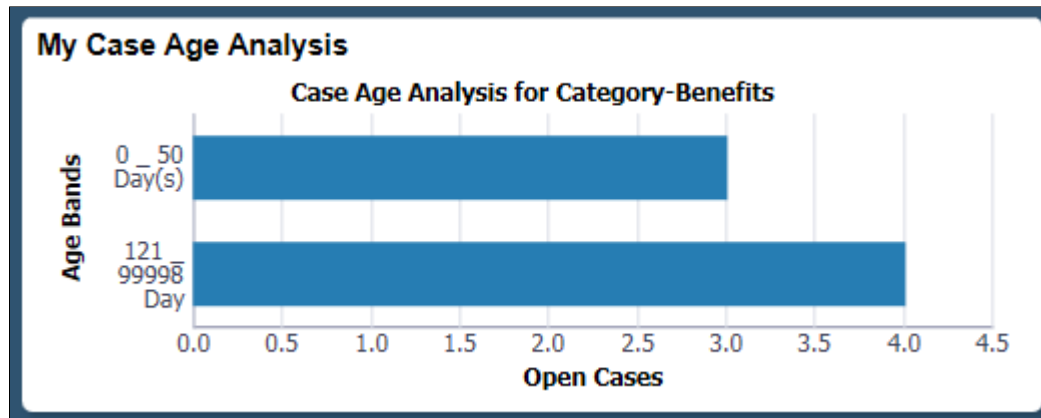
The My Case Age Analysis tile (CR_RC_PG_A_CASE_AG_FL_GBL) displays live chart data for an agent to analyze his case age. By default, the chart displays the case age distribution for cases in a particular category by age bands.

Tap the My Case Age Analysis tile to access the My Case Age Analysis page.

Navigation:

Select Fluid Home under the main menu, the My Case Age Analysis tile is available in the Agent Dashboard page.

This example illustrates the My Case Age Analysis tile.



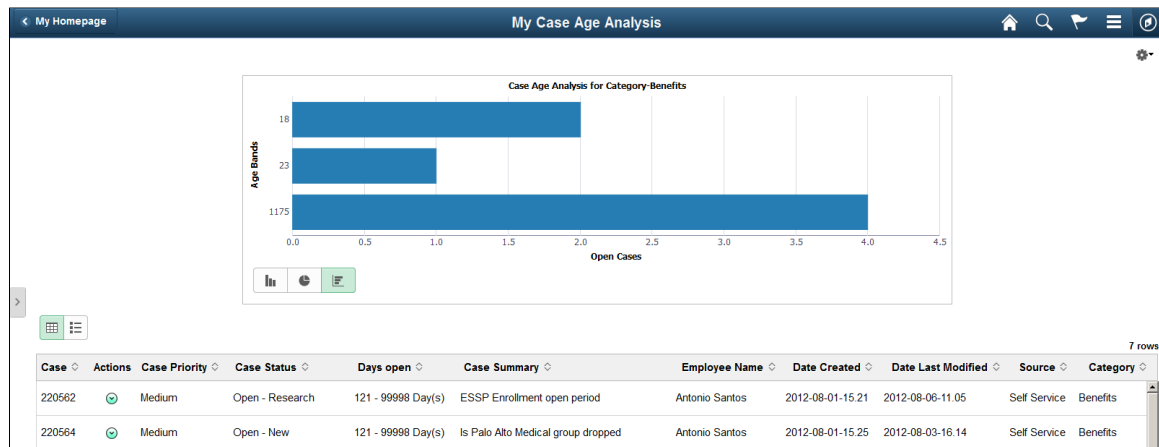
My Case Age Analysis Page

Use the My Case Age Analysis page (RC_PG_A_CASE_AG_LFL) to view an interactive pivot chart for an agent's open case backlog by category and perform drilldown by case age to see the distribution for case age.

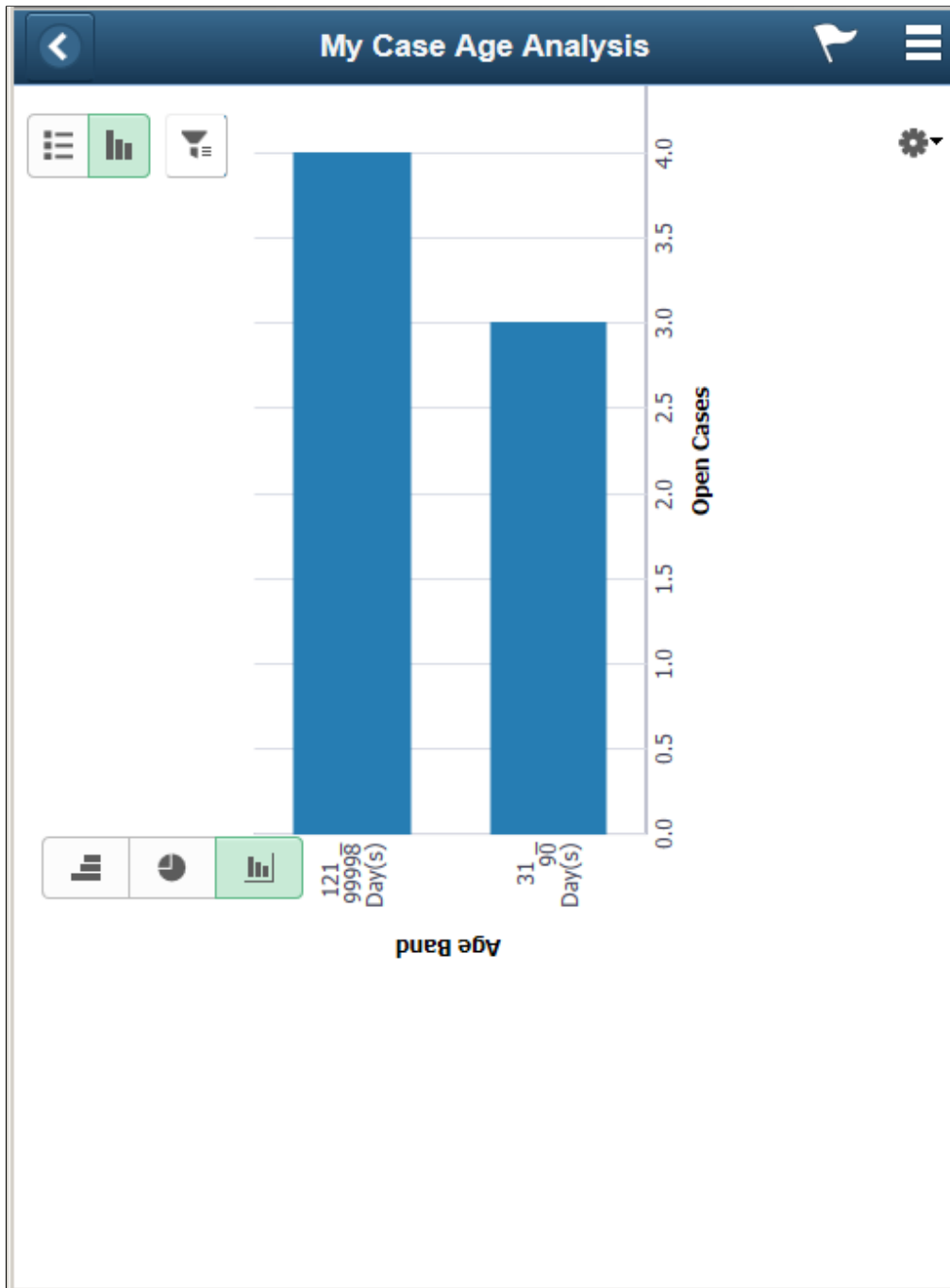
Navigation:

Tap the My Case Age Analysis tile on the Agent Dashboard page.

This example illustrates the fields and controls on the My Case Age Analysis page using a tablet.



This example illustrates the fields and controls on the My Case Age Analysis page using a smartphone.



Case Arrival vs. Closure Tile

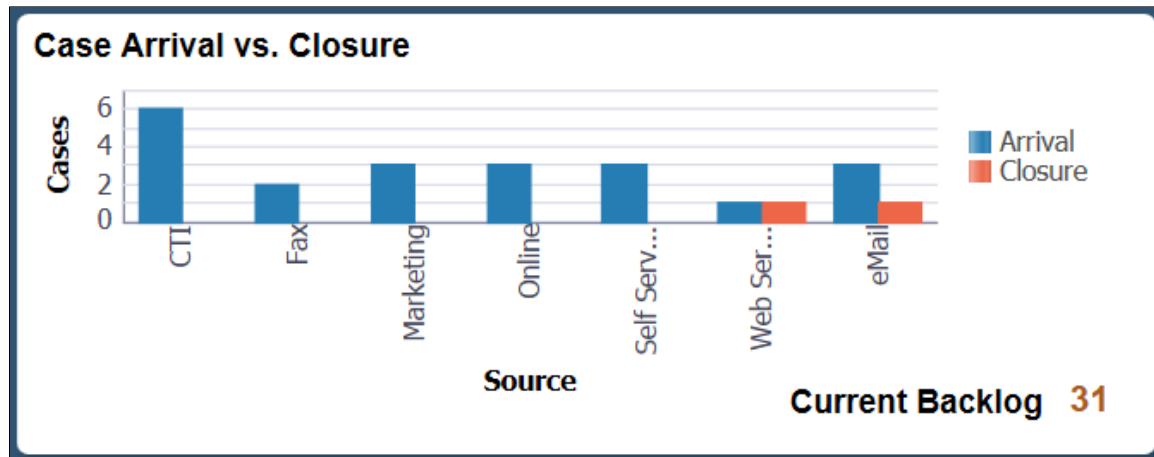
The Case Arrival vs. Closure tile (CR_RC_PG_A_ARR_CLSR_FL_GBL) displays the count of cases which had arrived and which were closed for the agent, based on the source. The tile also shows the overall count of open cases in the agent's backlog at the moment when the chart is being viewed.

Tap the Case Arrival vs. Closure tile to access the My Case Arrival vs. Closure page.

Navigation:

Select Fluid Home under the main menu, the Case Arrival vs. Closure tile is available in the Agent Dashboard page.

This example illustrates the Case Arrival vs. Closure tile.



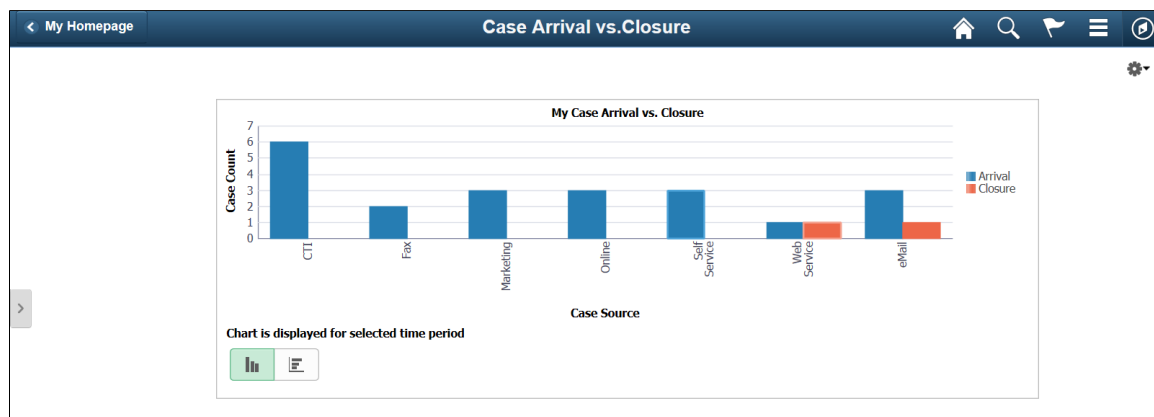
Case Arrival vs. Closure Page

Use the My Case Arrival vs. Closure page (RC_AGNT_ARR_CLS_LFL) to view the number of open cases and the cases closed by the agent from different sources, for a particular time period. The initial view provides a concise summary of the case arrivals versus closure trends for the agent.

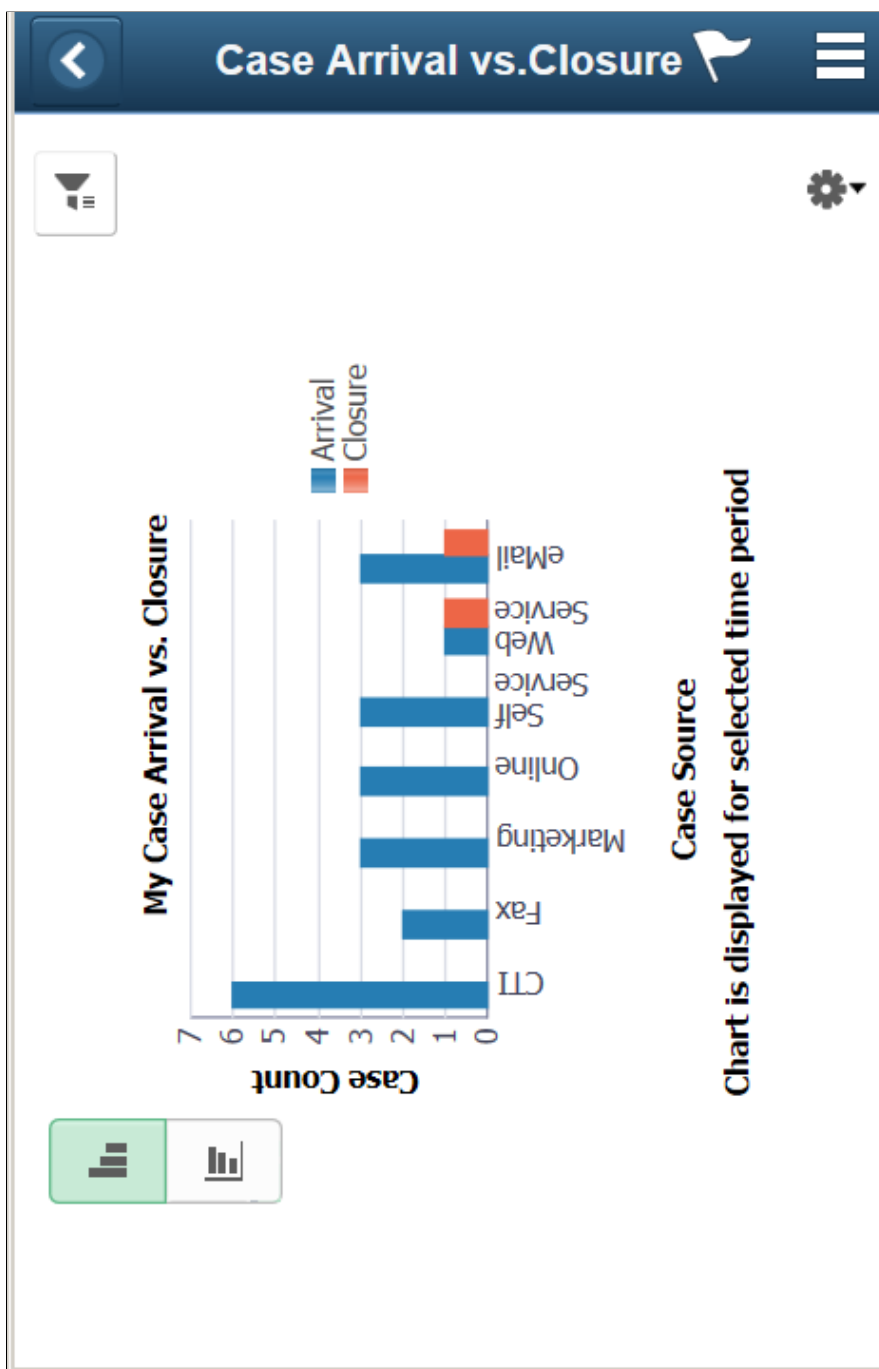
Navigation:

Tap the My Case Arrival vs. Closure tile on the Agent Dashboard page.

This example illustrates the fields and controls on the My Case Arrival vs. Closure page using a tablet.



This example illustrates the fields and controls on the My Case Arrival vs. Closure page using a smartphone.



Viewing PeopleSoft HR HelpDesk Insights

PeopleSoft HR Helpdesk Insights provide rich analytical visualizations and powerful reporting features. It offers great insights of HR Helpdesk data for Agents, Managers and Administrators. Moreover, customers can create and manage their own visualizations using the provided data.

The HR Helpdesk Insights dashboard is built on OpenSearch Dashboards, the data visualization tool used by OpenSearch.

For information on OpenSearch Dashboards, see PeopleTools Search Technology, “Monitoring PeopleSoft Search Framework and Opensearch Using PeopleSoft Insights” and “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

This topic provides an overview of the deployment and access of the insights for HR Helpdesk, discusses how to view PeopleSoft HR Helpdesk Insights for agents and managers, and the steps to enable document level security for managers.

Understanding How to Deploy and Access HR Helpdesk Insights

Before users can access the HR Helpdesk data in PeopleSoft Insights, the following steps should be performed:

1. Deploy and run the below search indexes.

(PeopleTools > Search Framework > Administration > Deploy/Delete Object)

<i>Index</i>	<i>Dashboard</i>
CR_RC_AGENT_ESKB	Agent Backlog Insights and Agent Backlog Insights Tile
CR_RC_MANAGER_ESKB	Manager Backlog Insights and Manager Backlog Insights Tile
CR_RC_MANAGER_ARCL_ESKB	Performance Insights and Performance Insights Tile
CR_CO_SOLUTION_KB	Solution Management Insights and Solution Management Insights Tile

2. Deploy the below dashboards:

- Agent Backlog Insights
- Agent Backlog Insight Tile
- Manager Backlog Insights
- Manager Backlog InsightsTile
- Performance Insights
- Performance InsightsTile
- Solution Management Insights
- Solution Management Insights Tile

(PeopleTools > Search Framework > Administration > Deploy OpenSearch Dashboards)

Note: You need to run the full index prior to deploying the dashboard. In order to run CR_CO_SOLUTION_KB index, you must run CR_CO_SOLUTION index first.

- Assign the below user roles to users to access and view HR Helpdesk Insights:

<i>Dashboard</i>	<i>Roles</i>	<i>Users</i>
Agent Backlog Insights Agent Backlog Insights Tile	Agent Backlog Insight	Agents
Manager Backlog Insights Manager Backlog Insights Tile	Manager Backlog Insight	Administrators/Managers and above
Performance Insights Performance Insights Tile	MGR Performance Report	Administrators/Managers and above
Solution Management Insights Solution Management Insights Tile	Solution Management Insight	Content Owners and Knowledge Managers

Enabling Document Level Security for Search Indexes

Open Search supports document level security which will reflect in the Insights dashboards as well. Search indexes created for PeopleSoft Insights are provided with document level security attributes, but by default, it is enabled only for CR_RC_AGENT_ESKB index (Agent Backlog Insights Dashboard). The document level security for Insights dashboard is based on provider group. or agents, all the cases applicable to their provider groups are listed when document level security is enabled.

Manage Dashboard Security for Manager Backlog Insights and Performance Insights

To configure document level security for search indexes, follow the below steps:

- Undeploy the search definition
(PeopleTools > Search Framework > Administration > Deploy/Delete Object)
- Modify the search definition.
(PeopleTools > Search Framework > Designer > Search Definition)
 - Edit the Search Definition
 - Navigate to Security Tab
 - Select “Document Level Security”
 - In “Query Field Mapping” – “Source Field” – select “A.CASE_SRCH_SECID”

- e. Choose Package Name – RB_TEXT_SEARCH
- f. Path –Security
- g. Class ID -Choose:
 - For CR_RC_MANAGER_ESKB (Manager Backlog) - ProviderGroupMGRSecurity
 - For CR_RC_MANAGER_ARCL_ESKB (Manager Performance Report) – ProviderGroupMGRARCLSecurity

Security Settings Page

Security Settings

Search Definition
CR_RC_MANAGER_ESKB

Description
Kibana Manager Backlog Report

Security Option

☐ No Security
☐ Source Level Security
☒ Document Level Security

Document Level

Query Field Mapping

Query Name	Source Field	Attribute Name	Privilege		
1 RC_MGR_BKLG_ESQ	A.CASE_SRCH_SECID	CASE_SRCH_SECID	Allow	+	-

Document Filter App Class

Package Name:
RB_TEXT_SEARCH

Path:
Security

Class ID:
ProviderGroupMGRSecurity

Save
Save As

- h. Deploy Search Definition.
- i. Schedule and Run Search Index.

Viewing Agent Backlogs

The Agent Backlog Insight dashboard helps agents to organize their day to day work, review high priority cases, manage unassigned cases and escalations. It allows you to view various dashboard metrics, backlog by provider group, assignments, business unit, etc.

Navigation:

The Agent Backlog Insights tile is delivered as part of HR Service Agent Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

Pages Used to View Agent Backlogs

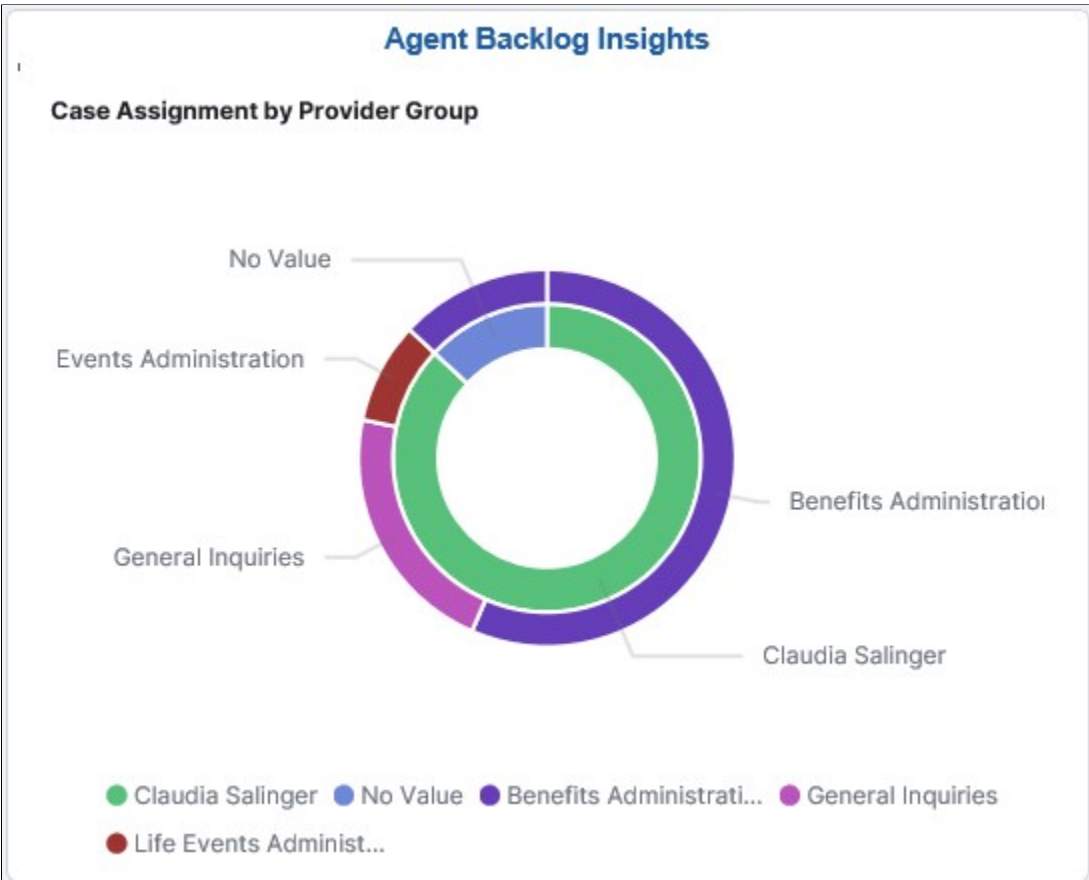
This topic discuss the pages used to view agent backlogs.

Page Name	Definition Name	Usage
Agent Backlog Insights Tile	RC_AGT_KIB_CREF	Access the backlog insights dashboard for agents.
Agent Backlog Insights Dashboard	N/A	Review and analyze various agent tasks using PeopleSoft Insights.

Agent Backlog Insights Tile

Use the Agent Backlog Insights tile to access the Agent Backlog Insights dashboard.

Agent Backlog Insights Tile



The Agent Backlog Insights tile displays the Case Assignment by Provider Group visualization, which gives a snapshot of the cases assigned to an agent.

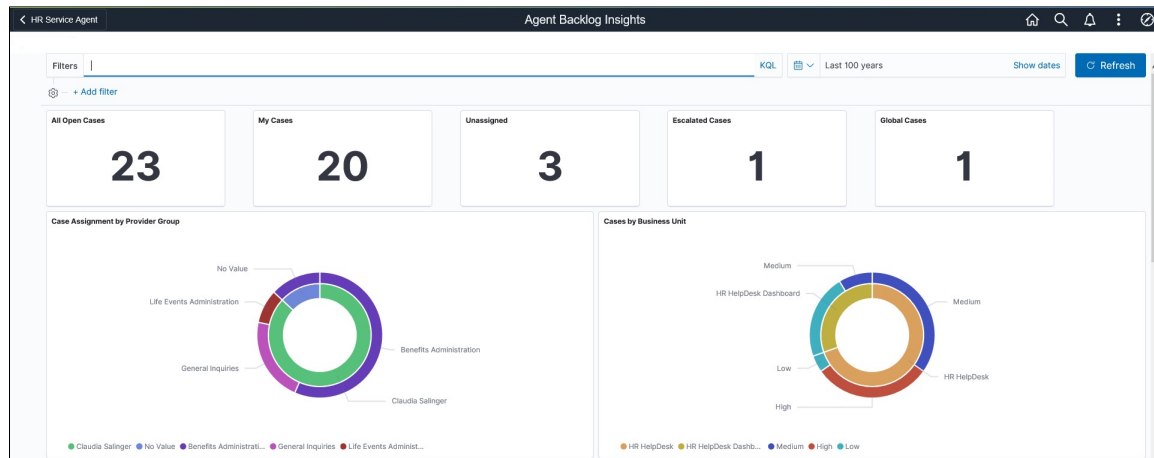
Agent Backlog Insights Dashboard

Use the Agent Backlog Insights dashboard to view the case backlog insights of agents.

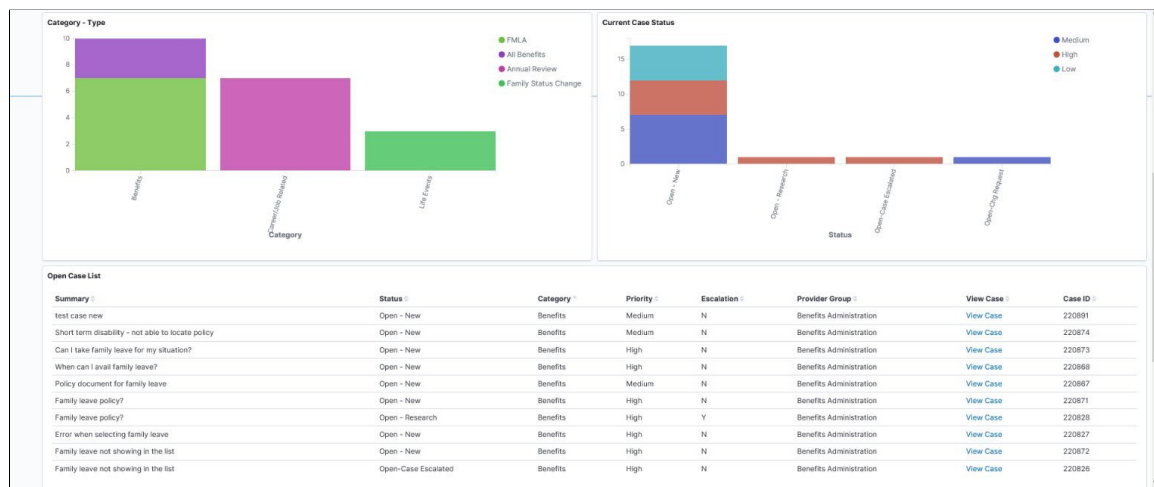
Navigation:

Click the Agent Backlog Insights tile to access Agent Backlog Insights dashboard.

This example illustrates the Agent Backlog Insights dashboard (1 of 2).



This example illustrates the Agent Backlog Insights dashboard (2 of 2).



Using the interactive visualizations that are available on the dashboard, you can see the metrics such as open cases (cases assigned to provider group but not to agents), cases assigned to agents, unassigned cases (cases assigned to provider group but not to agents), escalated cases, and global cases. You can also view the case assignment by provider group, case priority as well as case status. When you select filters or chart items or modify the date range, PeopleSoft Insights dynamically updates all visualizations.

The Agent Backlog Insight dashboard delivers these visualizations:

- CaseMetrics
- Case Assignment by ProviderGroup

- Cases by BusinessUnit
- Category –Type
- Current Case Status
- Open Case List

Case Metrics

This metrics displays the following:

- All OpenCases
- MyCases
- Unassigned
- Escalated Cases
- Global Cases

Case Assignment by Provider Group

This doughnut chart displays the cases assigned to the agent and unassigned cases from agent's provider group. The outer layer shows the provider group of the cases.

Cases By Business Unit

This doughnut visualization displays the open cases by Business Unit and Priority. The outer layer displays the priority and inner layer shows the business unit.

Category – Type

This visualization displays the classification of cases based on its Category and Type.

Current Case Status

This visualization displays the statuses of open category with case priority.

Open Case List

This grid displays the list of open cases, which are presented in the above visualizations. The agent can see the basic details of case and can navigate to case details. Click the View Case link in the View Case column to access the case details.

Viewing Manager Backlogs

The Manager Backlog Insight dashboard displays details of backlog such as backlog by business unit and priority, the agent working on escalations and check all the incoming cases are triaged; thereby enables the managers to monitor and track the team's activity.

Pages Used to View Manager Backlogs

This topic discusses the pages used to view manager backlogs.

Page Name	Definition Name	Usage
Manager Backlog Insights Tile	RC_MGR_KIB_CREF	Access the backlog insights dashboard for managers.
Manager Backlog Insights Dashboard	N/A	Review and analyze various manager tasks using PeopleSoft Insights.

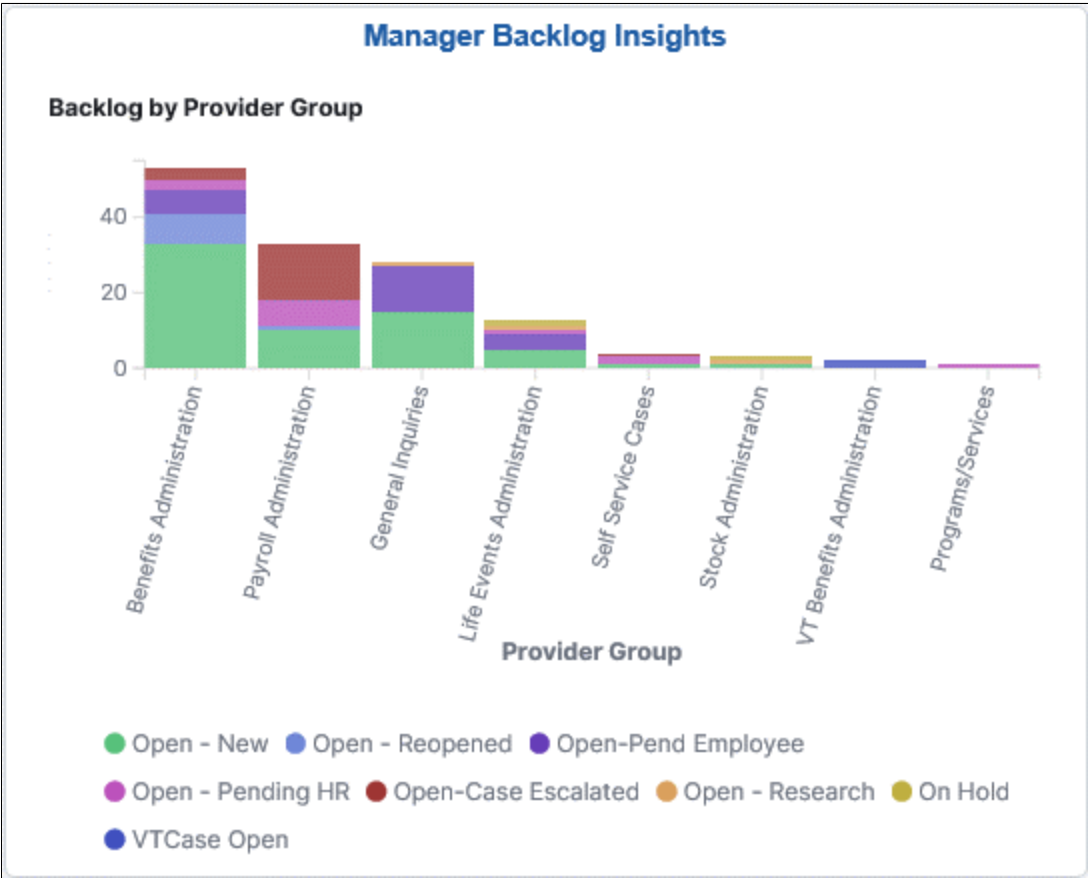
Manager Backlog Insights Tile

Use the Manager Backlog Insights tile to access the Manager Backlog Insights dashboard.

Navigation:

The Manager Backlog Insights tile is delivered as part of HR Service Manager Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

Manager Backlog Insights Tile



The Manager Backlog Insights dashboard in PeopleSoft Insights provides you with different visualizations to analyze the open cases for the respective provider groups and associated managers. You can also view the total number of high priority and escalated cases. When you select filters or chart items, PeopleSoft Insights dynamically updates all visualizations.

For details on common elements and controls used in the visualization, see [Common Elements and Controls](#).

The Manager Backlog Insights dashboard delivers these visualizations:

- Case Metrics (High priority cases, escalated cases)
- Backlog Arrival by Provider Group
- Backlog by Business Unit and Priority
- Backlog by Provider Group
- Escalated Cases by Agents
- Unassigned Cases by Provider Group
- Escalated Case List

Quick Filter – Manager Backlog

Additional Filters allows you select filters based on below attributes:

- Business Unit
- Manager Name
- Provider Group
- Agent

Case Metrics

This metrics displays the number of high priority and escalated cases.

Backlog Arrival by Provider Group

This visualization displays the open cases based on created month and by its assigned provider group. The default time period is set as 'month'. You can select the required time range in this chart to drill down by time period.

Backlog by Business Unit and Priority

This double doughnut chart visualization displays the number of open cases by business unit and priority. The inner layer displays the provider group and the outer layer displays the priority of cases in respective provider group.

Backlog by Provider Group

This visualization displays the cases allocated in each provider group and its current status.

Escalated Cases by Agents

This visualization displays the agents and assigned escalated case counts.

Unassigned Cases by Provider Group

This visualization displays the Cases not assigned to an agent (unassigned cases) for different provider group and its priority.

Escalated Case List

The Escalated Case List grid lists the escalated cases, in a tabular format.

Viewing Performance Insights

Performance Insights facilitates managers to analyze the service delivery performance. You can compare the arrival and closure rates of cases with various parameters.

Pages used to View Performance Insights

This topic discusses the pages used to view performance insights.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Performance Insights Tile	RC_PERF_KIB_CREF	Access the performance dashboard for managers.
Performance Insights Dashboard	N/A	Review and analyze various manager tasks using PeopleSoft Insights.

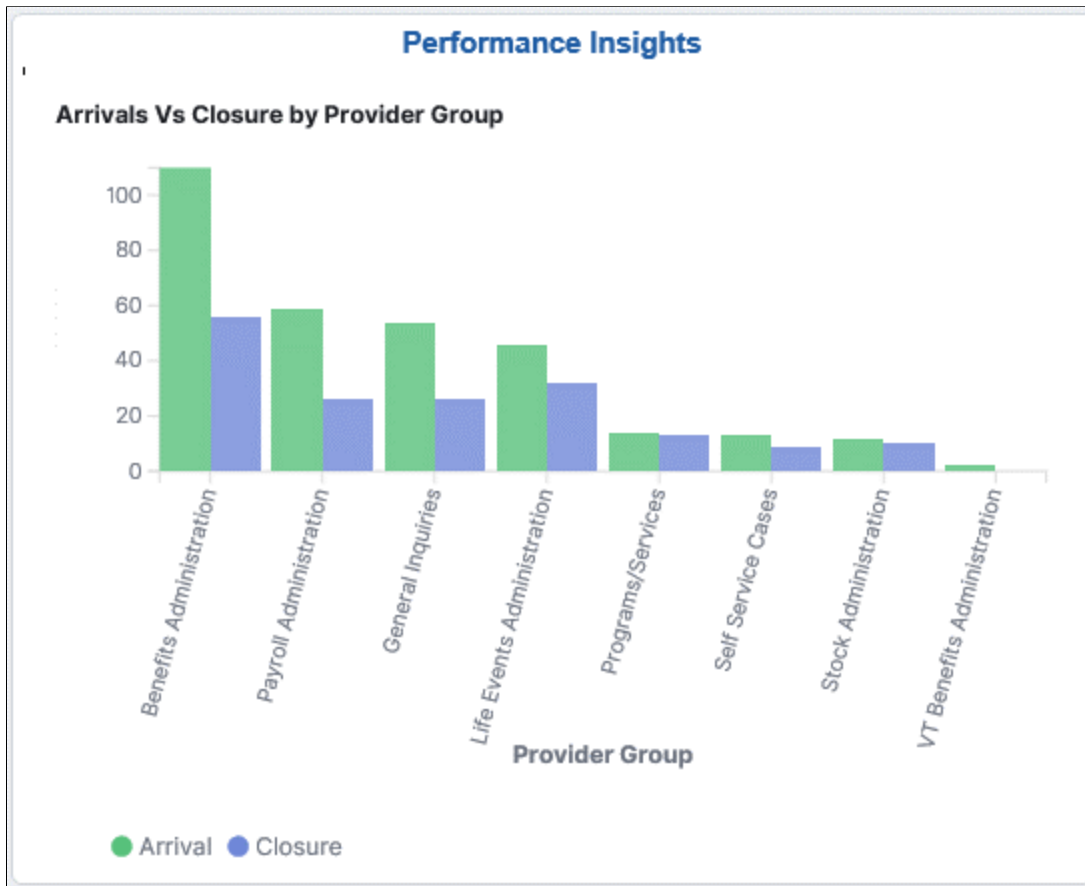
Performance Insights Tile

Use the Performance Insights tile to access the Performance Insights Dashboard.

Navigation:

The Performance Insights tile is delivered as part of HR Service Manager Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

Performance Insights Tile



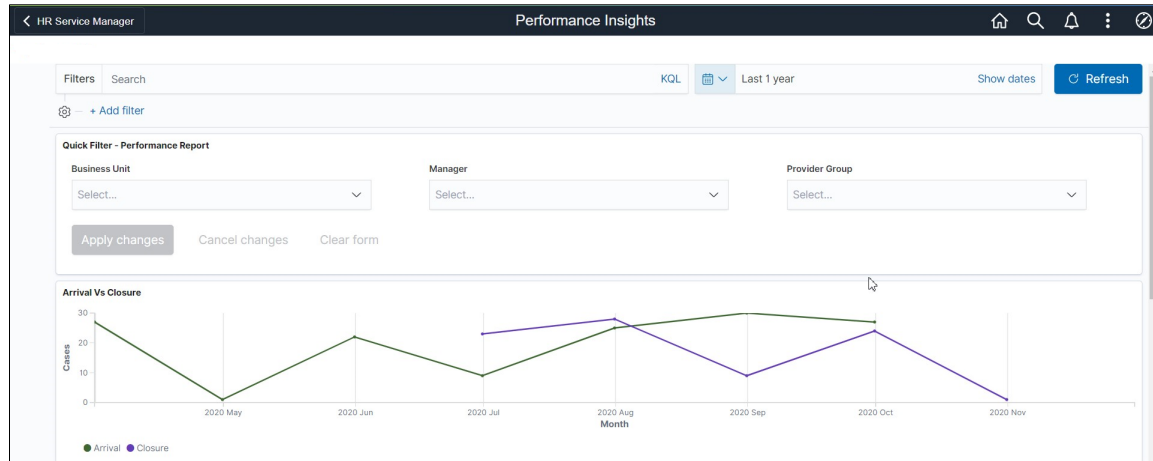
Performance Insights Dashboard

Use the Performance Insights Dashboard to view and analyze visualizations related to service delivery performance.

Navigation:

Click the Performance Insights tile to access the Performance Insights Dashboard.

This example illustrates the Performance Insights Dashboard (1 of 2).



This example illustrates the Performance Insights Dashboard (2 of 2).



For details on common elements and controls used in the visualization, see Common Elements and Controls.

The Performance Insights Dashboard delivers these visualizations:

- Arrival Vs Closure
- Arrivals Vs Closure by ProviderGroup
- Case Arrival by ProviderGroup
- Case Arrival by Categories
- Average Days to Close Case

Quick Filter – Performance Report

Additional Filters allows you select filters based on below attributes:

- BusinessUnit
- Manager
- ProviderGroup

Arrival Vs Closure

This visualization displays the arrivals and closure of cases based on time period. The default time period is set as ‘month’. Users can select the time range in this chart to drill down by time.

Arrivals Vs Closure by Provider Group

This visualization displays the overall Arrivals and Closure of cases by provider group.

Case Arrival by Provider Group

This visualization displays the case arrival by provider group over a time period. Here, default time period is set as ‘Month’.

Case Arrival by Categories

This visualization displays the case arrival by category over a time period. Here, default time period is set as ‘Month’.

Average Days to Close Case

This visualization displays the average time required to close a case by provider groups.

Viewing Solution Insights

Solution Management Insights facilitates Content Owners and Knowledge Managers to view the health and statistics of Solution Knowledge Base. You can analyse the usage and efficacy of solutions through Case experience and Self Service usage.

Pages used to View Solution Insights

This topic discusses the pages used to view solution management insights.

Page Name	Definition Name	Usage
Solution Management Insights Tile	RC_SOLN_KIB_CREF	Access the solution management insight dashboard for content owners and knowledge managers.

Page Name	Definition Name	Usage
Solution Management Insights Dashboard	N/A	View and analyze the health and statistics of Knowledge Bases using PeopleSoft Insights.

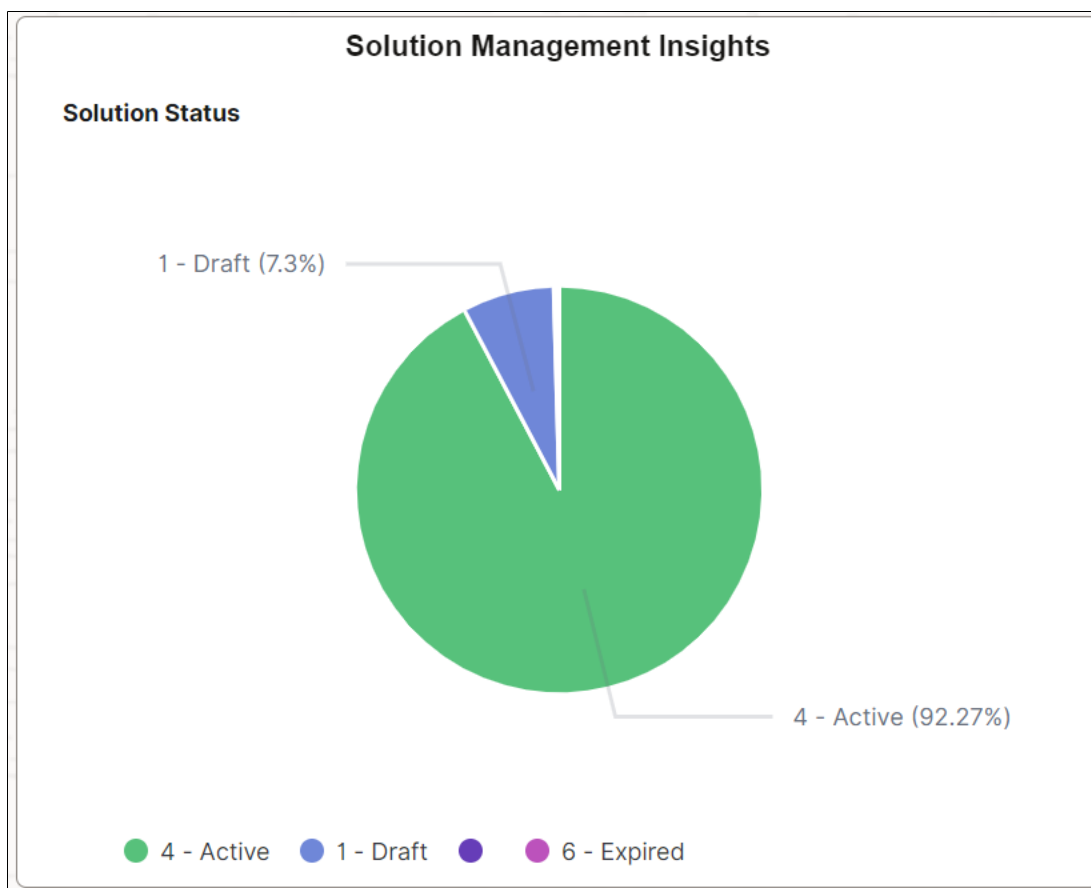
Solution Management Insights Tile

Use the Solution Management Insights tile to access the Solution Management Insights Dashboard.

Navigation:

The Solution Management Insights tile is delivered as part of HR Service Manager Home Page. You can add the tile, through personalization, to a system-delivered homepage or a homepage that you create.

This example illustrates the Solution Management Insights tile.



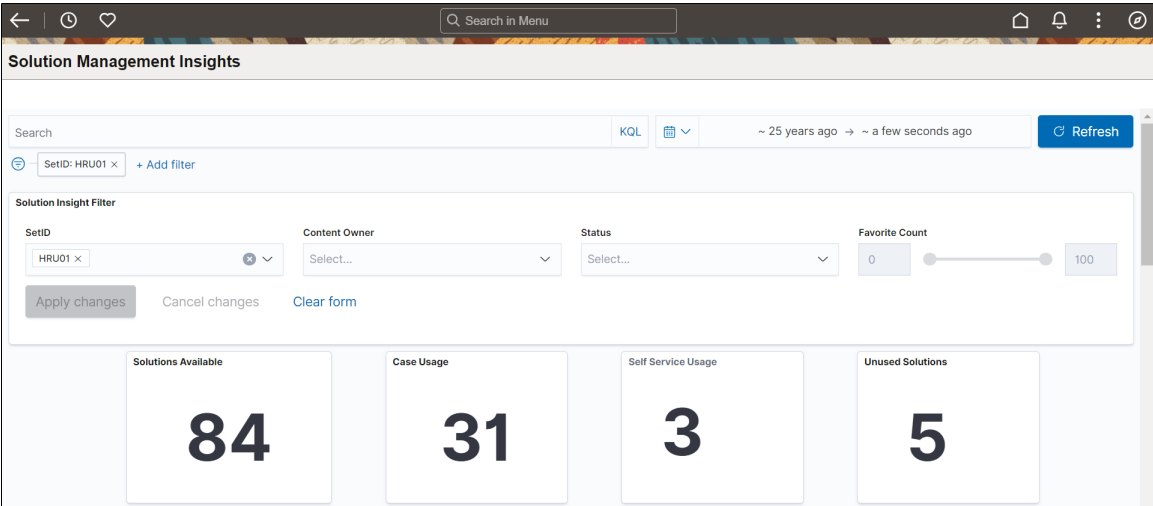
Solution Management Insights Dashboard

Use the Solution Management Insights Dashboard to view and analyze the health and statistics of Solution Knowledge Base.

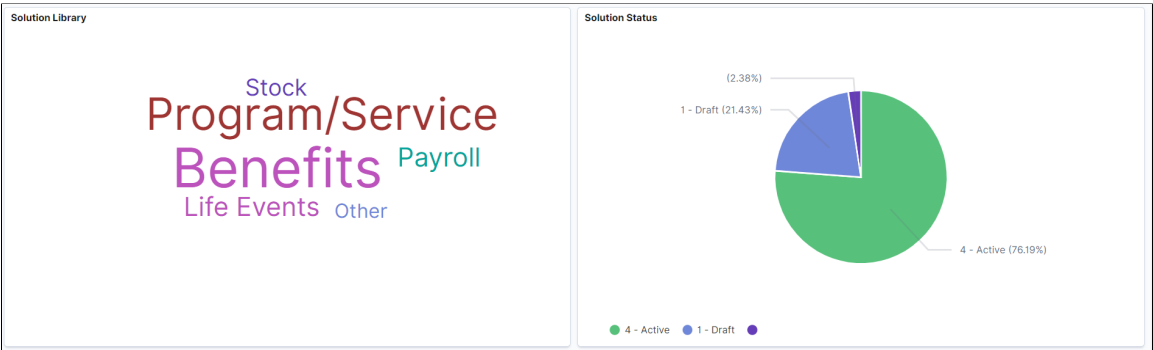
Navigation:

Click the Solution Management Insights tile to access the Solution Management Insights Dashboard.

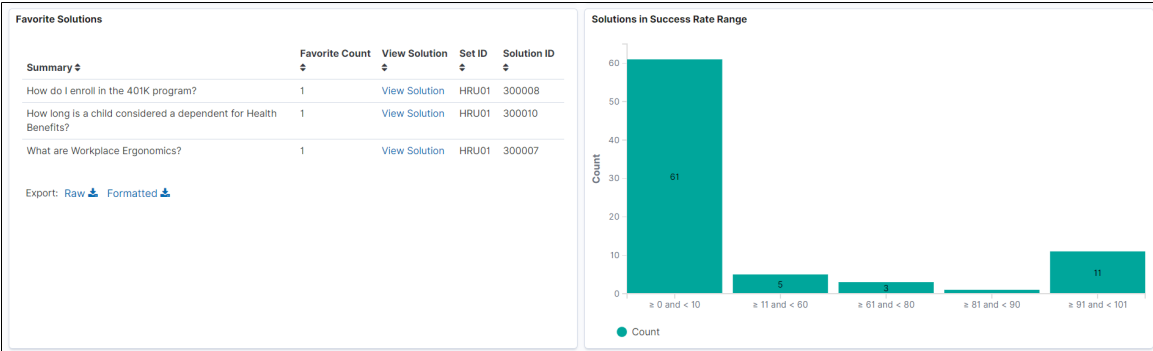
This example illustrates the Solution Management Insights Dashboard (1 of 5).



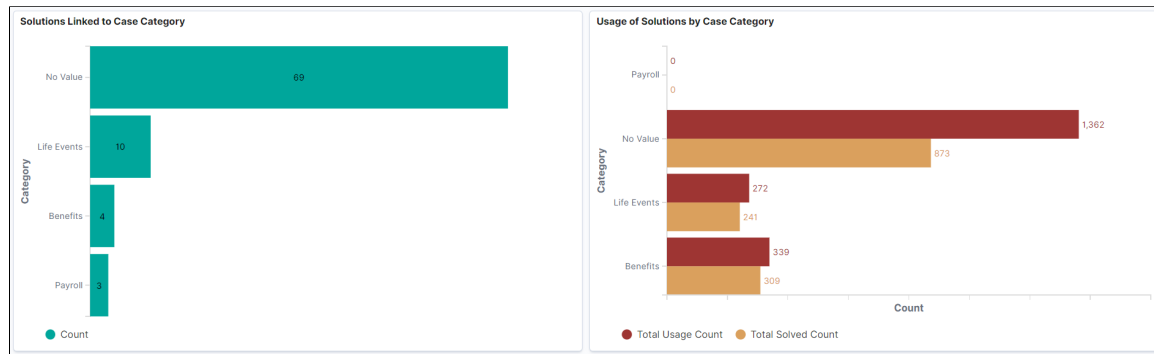
This example illustrates the Solution Management Insights Dashboard (2 of 5).



This example illustrates the Solution Management Insights Dashboard (3 of 5).



This example illustrates the Solution Management Insights Dashboard (4 of 5).



This example illustrates the Solution Management Insights Dashboard (5 of 5).

Solution List																
Summary ↕	Type ↕	Status ↕	Content Owner	Favorite Count ↕	Total Usage Count ↕	Solved Count ↕	Success Percent ↕	Self Service Usage ↕	Self Service Unsolved ↕	Self Service Solved ↕	Feedback ↕	Open Feedback ↕	Last Used ↕	View Solution ↕	Set ID	Solution ID ↕
Keyboard Ergonomics	Standard Solution	4 - Active		0	0	0	0	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300002
Is Acupuncture covered by Medical benefits?	Standard Solution	4 - Active	Benefits Administration	0	50	45	90	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300003
Community Service Helping Hand - How you can you help?	Standard Solution	4 - Active		0	0	0	0	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300004
What is the Employee Stock Purchase Plan, or ESPP?	Standard Solution	4 - Active		0	11	8	72.72	0	0	0	0	0	Aug 26, 2016 @ 18:52:18.000	View Solution	HRU01	300005
How to order a replacement security badge	Standard Solution	4 - Active		0	0	0	0	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300006
What are Workplace Ergonomics?	Standard Solution	4 - Active		1	0	0	0	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300007
How do I enroll in the 401K program?	Standard Solution	4 - Active	Benefits Administration	1	452	287	63.49	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300008
Workers Compensation - What is it?	Standard Solution	4 - Active		0	0	0	0	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300009
How long is a child considered a dependent for Health Benefits?	Standard Solution	4 - Active	Benefits Administration	1	61	60	98.36	0	0	0	0	0	Jul 7, 2017 @ 21:32:45.000	View Solution	HRU01	300010
U.S. Holiday Schedule 2002	Standard Solution	4 - Active	Benefits Administration	0	0	0	0	0	0	0	0	0	Jan 1, 1900 @ 13:21:10.000	View Solution	HRU01	300011
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For details on common elements and controls used in the visualization, see Common Elements and Controls.

The Solution Management Insights Dashboard delivers these visualizations:

- Overall Solution Usage and Metrics
- Solution Library
- Solution Status
- Favorite Solutions
- Solutions in Success Rate Range
- Solutions Linked to Case Category
- Usage of Solutions by Case Category
- Solution List

Solution Insights Filter

Additional Filters allows you select filters based on below attributes:

- Set ID
- Content Owner
- Status
- Favorite Count

Overall Solution Usage and Metrics

This metrics displays the following details:

- Total number of solutions available
- Solutions used in case (Case Usage)
- Solutions accessed by employees using Self Service
- Total number of solutions that have not been used. This metrics help you identify which solutions require review or promotion.

Solution Library

This tag cloud visualization displays the solutions associated with libraries.

Solution Status

This visualization displays the current status of solutions such as waiting for approval, Draft, Approved, Active etc. Content owners or knowledge managers can review and act on these solutions.

Favorite Solutions

This visualization displays the list of solutions marked as 'Favorite' by agents. Content Owners or Knowledge Managers can refer/promote favorite solutions to other agents working on similar cases.

Solutions in Success Rate Range

This visualization displays the performance of solutions. Content owners or knowledge managers can examine the solutions that require attention, particularly those that fall below the target success rate range.

Solution Linked to Case Category

This visualization displays the Solutions that are used to resolve the case linked with respective case categories. This data will be useful in reusing the agent's experience of addressing cases with solutions.

Usage of Solutions by Case Category

This visualization displays the usage count and solved count on each case category of solutions.

Solution List

The Solution List displays the details and data on the visualizations in tabular form. Click the View Solution link to access the solution details.

Common Elements and Controls

This section lists the common elements and controls that are used in PeopleSoft Insights.

Note: Filtering options apply to all visualizations, which allows users to drill down on all the charts at once.

Field or Control	Description
Open in OpenSearch Dashboard	This link appears only for users with role <i>Search Administrator</i> .
Filters search field,  (Change all filters), and + Add filter	Enter criteria to filter data on the visualizations. You can add filters in a number of ways: • Enter them manually in the Filters search field. • Use the + Add filter link to create filters using fields, operators and field values. • Select a chart item from a visualization. • Use the legend to add or exclude items (applicable to some visualizations). Added filters are displayed below the Filters search field for reference. Click the Filters link by the search field to hide or show a list of filters that have been applied to the insights. A badge number appears to show the number of filters currently applied to the insights. Click the Change all filters gear icon for a list of actions that can be performed on <i>all</i> filters, for example, disable them temporarily, delete them permanently, or invert inclusion (show data that does not meet filter criteria). Click a filter item for a list of similar actions that can be performed on it individually.

Field or Control	Description
 (Calendar) or Show dates	Click to select a different time period for the insights. You can enter it manually, or choose from commonly used date ranges provided the system as well as recently used selections. When a new period is selected, all visualizations are refreshed automatically to reflect that change. If you have selected a commonly used date range, for example, <i>This month</i>, or <i>Week to date</i>, click the Show dates link to view the approximate date period in relation to the current date. For example, the current date is November 1 and the selected date range is <i>Year to date</i>. Clicking the Show dates link displays ~ <i>10 months ago</i> —> <i>now</i>, which indicates that the selected date range started from approximately 10 months ago and ends on the current date.

When you pause over a visualization, the Options and Legend (if applicable) icons are displayed on the top right and bottom corners respectively. Use them to inspect the chart or table and view the details of that visualization, and toggle the legend display.

Field or Control	Description
 (Options)	Pause over the Options icon to select one of these options: • <i>Inspect</i>: Select this option to have a slide out page appear providing the details in a grid format. You can also download data from this page. • <i>Full screen</i> or <i>Minimize</i>: Select Full screen to have the page display only this visualization in full screen. Select Options, Minimize to return to the dashboard in PeopleSoft Insights and display all visualizations.
 (Toggle legend)	Click this icon to hide or display the legend for the chart, if available. You can click an item in the legend to change its color, or add it as a filter (if applicable).
Chart item (bar, pie slice, and so forth)	Hover over a chart item, such as a bar item or pie slice, to view a summary of details for that item. Select a chart item to add a filter for it to apply to all visualizations.

For more information on working with PeopleSoft Insights and filters, see PeopleTools *Search Technology*, “Working with Insights Dashboards for PeopleSoft Application Data” documentation.

Using Change Management

Understanding Change Request Access

This topic discusses the five ways to access change requests:

- Through the HelpDesk menu.

Navigate to **HelpDesk > Add Change Request** or **HelpDesk > Search Change Requests**.

Note: If you want to create a new change request, the system displays a blank Change Request page. If you want to search for existing change requests, the system displays the configured search page for Change Management.

- From the HelpDesk Case page.

From the HelpDesk Case page, the **Actions** section enables the user to directly create a new change request. Creating the request for change from the case creates a direct link between the change request and the case. You can view the change request from the case and the case from the change request.

- From the Quality Management - Defect page.

Using the Related Actions functionality, you can create a new change request directly from the defect. Also, you can identify and link an existing change request to the defect. Linking causes the change request to be viewed from the defect, and the defect to be viewed from the change request.

- From the Worker 360-Degree View page.

This page provides the ability to both add a new change request from the employee view, and to view any requests already added by that employee.

- From Employee Self Service.

You can add a change request by navigating to **Employee Self Service > HelpDesk > Add Change Request**.

Understanding Change Request Management

This topic discusses:

- Main Change Request page.
- Notes page.
- Tasks page.

- History page.
- Related Changes page.
- Related Actions page.
- Interested Parties page.

Main Change Request Page

You can access the main Change Request page by using any of the five available methods. After the page appears, you can see the six distinct sections on the Change Request page:

- Requestor Information section.

The user must enter a change request requester. The agent can select a person from any available employee record. The system provides the default values for the requester's department, location, manager's name, and manager's telephone fields from the employee record that was selected.

- Change Request section.

In this section, you record information about the nature of the change request. The **Summary**, **Business Unit**, **Request Type**, **Status**, and **Priority** fields are required to save the change request. The other fields are informational only. You configure values for these fields. You set up these values by navigating to **Set Up CRM > Product Related > Change Management**.

See [Understanding Change Request Management](#).

- Product Information section.

This section enables you to link a particular product to a change request.

Users can link affected product groups or installed products to the change request using the **Lookup** button. They can refine the affected product further by linking the specific asset tag of the item affected. The **View Affected Parties** link appears when the selected installed product has specific employees linked to it. Clicking this button results in the appearance of all of the linked employees.

- Change Control section.

This section is used to record more specific information about the change request. The **Impact**, **Category**, **Release #**, **Resolution**, and **Requested By Date** fields are informational only.

The start dates and start and end times are not only informational; the system uses these fields to calculate duration. The **24/7** check box enables work to be scheduled beyond a normal Monday to Friday, 9 to 5 work week.

The system uses the values entered in the Schedule subsection as a guide for the phase and for the task start and end dates. All phase and task dates, whether built manually in the Phase Summary section on the main Change Request page or populated automatically from the Phase Model setup option, are not allowed to start before the start date indicated in the Schedule subsection in the Change Control section. The system provides the value in the **End Date** field by default. It is the last date on the last task when the phase model or task model was either built or automatically loaded.

- Phase Summary section.

Use this section to manage the phases and tasks that are associated to a change request. Only phases are displayed in this grid. You can view associated tasks and phases on the Tasks page. Each phase in the Phase Summary section consists of a task or set of tasks that need to be completed in order for a change to be successful. Any required approvals should be presented in the form of an approval task.

See [Tasks Page](#).

You can build phases manually in this grid. Alternatively, you can have the system automatically populate phases and tasks by selecting a template and clicking the **Load** button.

See [Setting Up Phase Templates](#).

You can load any template by choosing the appropriate template name and clicking the **Load** button.

If users click the **Load** button without first selecting a phase template, all phase templates whose type, subtype, or priority fields match the type, subtype, and priority fields of the change request appear. Users then select the desired phase template, thus populating the phases in the **Phase Summary** grid and tasks on the Task page. You can manually build phases by clicking the **Add Phase** button.

- Audit History section.

This section tracks the dates and times that the change request was created and modified.

Note: The Change Control, Phase Summary, and Audit History sections are collapsed by default when you access the Change Request page.

See [Accessing Change Requests](#).

Notes Page

Notes pages follow the standard Notes and Attachments format that is used throughout the PeopleSoft CRM application suite. During the course of a change cycle, specific types of documentation may be required, such as backout plans, design documents, or a cost benefit analysis.

To identify these common documents within a specific note, PeopleSoft Change Management provides a **Note Type** field. Before adding an attachment to the note, you can identify the note type from the drop-down list box. The user configures the values in this field.

Related Links

“Understanding Notes and Attachments” (Application Fundamentals)

Tasks Page

The Tasks page displays all tasks, process flow steps, and decision points that are associated with a Change Request. PeopleSoft Change Management carries the task ID link to point to the Task Management application for the actual definition of the task.

Task Management tracks each task associated with a change request. Change Management uses Task Management functions for task groups to further define and control the process flow of a change request.

Tasks can be added, deleted, and edited from this page. They can be added automatically using the phase model or added manually.

Note: When an owner is added or changed on a change request, and at least one task is in the status of *In Progress*, the system displays a message asking if the change request owner should be applied to any uncompleted tasks. If the user clicks *No*, the system does not apply the owner on the change request to any tasks when the change request is saved. If the user clicks *Yes*, the system applies the owner on the change request to all uncompleted tasks that are not canceled when the change request is saved. If there are no tasks with the status of *In Progress*, then the system applies the owner change to all tasks on the change request, and the user does not receive a message. The system automatically makes the change.

Related Links

“Managing Tasks” (Automation and Configuration Tools)

History Page

AAF events control the process flow of a change request. Whenever an event is processed on a change request, it is audited and then appears on the History Events page.

Whenever a change is processed on a change request, it is audited and then appears on the History Audit page. The records to be audited are configurable when you set up your PeopleSoft CRM applications. History interactions appear when email is used to notify an assigned worker of a task action or status change.

Related Changes Page

The Related Changes page provides the ability to link similar change requests in either a parent/child or an equal relationship.

A status change is referred to as *cascading* when a status change on one change request causes the same status change on one or more change requests automatically. Cascading changes occur when a user manually changes the status or when an AAF rule executes unattended.

Several conditions must exist for cascading status changes to occur. First, the change request whose status is being changed must be related to another change request. Two characteristics define each relationship:

- Type
- Hierarchical indication

When the type is *Global* and the hierarchy indicator is a parent of the change request whose status is changing, then a cascading status occurs. If the status change is to a final type status (such as *Closed*, *Completed*, or *Rejected*) then the system displays a related change request with the two characteristics. These changes apply to online manual status changes.

For AAF rule execution status changes, the status is cascaded automatically when the Changed To status is marked as a cascading type status (see Status setup for this indicator).

Note: PeopleSoft Change Management does not deliver a definition or AAF rule for rule execution status changes. You can, however create your own rules using the PeopleSoft AAF functionality.

See “Understanding AAF” (Automation and Configuration Tools).

Related Actions Page

PeopleSoft Change Management also provides the ability to link cases and defects to a change. If a change request was initiated by defect identification or from a help desk case, you can link those defects and cases directly to the change request.

Linking a defect or case to a change request enables the user to drill down into these other objects directly from PeopleSoft Change Management. It also causes the change to be linked to the defect or case, and provides the ability to drill down into the Change Request from either PeopleSoft HelpDesk or PeopleSoft Quality Management.

Conversely, you can create and link change requests to defects from PeopleSoft Quality Management and to cases from PeopleSoft HelpDesk. Linking from either of these two applications also creates the linkage in PeopleSoft Change Management.

Linking cases and defects also causes status updates to be forwarded to the help desk agent or the quality analyst. You can determine and configure the type and frequency of the updates using AAF policies.

You will not be able to create either a case or a defect from PeopleSoft Change Management. Similarly, no cascading status functionality exists among cases, defects, and change requests.

Interested Parties Page

Interested parties, such as individuals who are not part of the change process by way of an assigned task or role, can receive notifications and updates about the change status through their inclusion on the Interested Parties page.

Users can designate interested parties to receive updates for only specific phases or for all phases.

Interested parties are limited to employees. You can determine and configure the type and frequency of the updates using AAF policies.

Accessing Change Requests

This topic discusses how to add new change requests and access existing change requests.

Page Used to Access Change Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Change Requests Search Page	RG_CHANGE_SRCH	Access existing search requests.

Change Requests Search Page

Use the Change Requests search page (RG_CHANGE_SRCH) to access existing search requests.

Navigation:

- **HelpDesk > Search Change Requests**

- **Employee Self-Service > HelpDesk > Manage A Change Request**
- **Worker 360 - Degree View > Change Requests > Search Requests**

This example illustrates the fields and controls on the Change Requests search page (1 of 2).

Change Requests					
Change Requests		Personalize Find View All			
First 1-4 of 4 Last					
Summary	Category				
Change Request	Unit	Summary	Requester	Owner	Created
400001	US200	Request for software upgrade	Alan Bailey	Rosa Hall	02/08/2006
400002	US200	Change Request for Software Requirement.	Richard Blaine	Terry Murphy	06/27/2007
400003	US200	Change Request for Infrastructure Management	Douglas Lewis	Spencer Underwood	06/27/2007
400004	US200	Change Request For a Training Course	Spencer Underwood	Alan Bailey	06/27/2007
Add Change Request					

This example illustrates the fields and controls on the Change Requests search page (2 of 2).

Search

Use Saved Search

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

*Business Unit = CRMCO APPLIANCES

Change Request ID begins with

Change Summary begins with

Requester Last Name begins with

Requester First Name begins with

Owner Last Name begins with

Owner First Name begins with

Status =

Request Type =

Sub Type =

Priority =

Category =

Product Group =

Product ID =

Search

Clear

Advanced Search

Save Search Criteria

Delete Saved Search

Personalize Search

If the field that you are looking for to search by does not appear on the basic search page, use the advanced search page or click the **Personalize Search** link and select any unchecked search fields that you wish to use.

The system displays the Personalize Search Settings page if the system administrator has made this page available to you. You can use this page to select additional fields to appear on the search page.

If you still do not see the field that you are looking for, contact your system administrator. Remember that you can enter part of the whole value in most fields, depending on what operators are set for a given search field. Most of these values are also user defined. They are based on the needs of your organization.

Related Links

- “Change Management Page” (Application Fundamentals)
- “Understanding the Configurable Search” (Automation and Configuration Tools)
- “Personalizing the Search Page” (Automation and Configuration Tools)
- “Performing Searches” (Automation and Configuration Tools)

Managing Basic Change Request Information

This topic discusses how to manage basic change request information.

Pages Used to Manage Basic Change Request Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Change Request Page</u>	RG_CHANGE_REQUEST	Add new change requests.
<u>Collect Attributes for Change Request Page</u>	RG_ATTR_PROD_SEC	Add or edit attributes to be associated for each installed product on a change request.
<u>Add Change Request Page</u>	RG_CHANGE_REQ_SS	Add new change requests in HelpDesk Self-Service.
<u>Manage Change Requests Page</u>	RG_CHANGE_SS_SRCH	Search for and access change requests in HelpDesk Self-Service.

Change Request Page

Use the Change Request page (RG_CHANGE_REQUEST) to add new change requests.

Navigation:

- **HelpDesk > Add Change Request**
- **HelpDesk > Add Case**

Select *Change Request* from the **Related Actions** drop-down list box in the Actions section.

This example illustrates the fields and controls on the Change Request page (1 of 2).

Change Request

Save | 360-Degree View | Notification | Search | Add Change Request | Clone | Correspond | Personalize

Change ID NEW Requester Mable Saxon
Priority High Type Hardware

Change Request | Notes (0) | Tasks (0) | History | Related Changes (0) | Related Actions (0) | Interested Parties (0)

Go To Select One...

Requester Information

*Requester Mable Saxon Search Again Phone 925/694-7982
Department Western Sales Region Location California Location
Manager No Manager defined Manager Phone

Change Request

*Summary Upgrade Memory
Description Please add 2 gig memory

*Business Unit IT Help Desk *Status In Review
*Request Type Hardware Sub Type Desktop
Reason Problem/Incident *Priority Medium

Outage

Duration Units

This example illustrates the fields and controls on the Change Request page (2 of 2).

Product Information Personalize | Find | View All | First 1 of 1 Last

Product Ownership

Product Group Product Asset Tag
Computer Hardware Compass Notebook PC with DVD

Add Product Information

Change Control

Impact Minor Category Minor
Release # Resolution
Change Owner Requested By Date 11/27/2014
24/7 Schedule
Start Date 11/27/2014 Start Time 2:00PM End Date 11/27/2014 End Time 2:20PM
Duration

Phase Summary Personalize | Find | View All | First 1-3 of 3 Last

Phase	Status	Start Date	Start Time	End Date	End Time
Approval	Approved	11/27/2014	2:00PM	11/27/2014	2:20PM
Scheduling	Approved	11/27/2014	2:20PM	11/27/2014	2:30PM
Implementation	Executing	11/27/2014	3:00PM	11/27/2014	4:00PM

Template Load Add Phase

Audit History

Use the fields on this page to define the nature of the change you are proposing.

Use the Change Request section to record basic information associated to a change request, such as a summary, type, reason and priority.

Field or Control	Description
Description	Manually enter a description of the change request, or enter a value by selecting a Text Tray value.
Status	Enter the status of the change request. Once a change request is associated with a status whose category is <i>Closed</i> or <i>Canceled</i> , the Audit History section of the page is updated with the date and time of that status change, as well as the userID and name of the person who made that change.
Duration	If the change request necessitates a service outage, specify the length of time for that outage in this field.
Units	Select the unit of time that applies to the number entered in the Duration field.

Use the Product Information section to manage the products and installed products that are associated to a change request.

Field or Control	Description
Product Group	Select the desired product group.
Product	Select the desired product. This is a required field. The choices available for product are limited to the appropriate setID, which is derived from the business unit of the change request. If a product group has already been specified, the available options for selecting a product are further limited to those within that product group. The installed product entry (Asset Tag value) will be defaulted onto the page if one and only one installed product exists for the specified product for the person listed as the Change Requestor. If you select a product and there are installed product entries associated with the product for multiple people, the system displays a link on far right side of the grid entitled <i>Affected Parties</i> to provide you with a way to display who has that product installed. This tells you who may be affected by the change request.
Asset Tag	Enter the desired asset tag number. You may prompt for valid installed product (asset) entries by using the lookup (magnifying glass) icon to the right of this field.

Field or Control	Description
	Click the Collect Attributes icon to display the Collect Attributes for Change Request page. The actual format and number of attributes will depend on what attributes (and their associated conditions) have been configured for a change request.
	The disabled Collect Attributes icon is displayed if attributes are not enabled for change requests for that installed product. No attribute collection is possible for that row in the grid.
From Owner (located on the Ownership tab of the Product Information grid)	This field will display the current owner of the selected installed product.
To Owner (located on the Ownership tab of the Product Information grid)	Select the person to whom ownership of the installed product should be transferred. This value will default to the change request Requester unless the current owner identified for the installed product is already the Requester. When a change request is saved with a Status set to a Category of <i>Closed</i>, the corresponding installed product entry will be updated with this person's name as the new owner.

Use the Change Control section to record important data associated to a change request, such as the impact, category and change requestor.

Field or Control	Description
Requested By Date	Enter the requested completion date for the change request.

Use the Phase Summary section to manage the phases and tasks that are associated to a change request. Only phases appear in this grid. You can also view tasks and the phases that are associated to them from the Tasks page.

Each phase in the Phase Summary section consists of a task or set of tasks that needs to be completed for a change to be successful. Any required approvals should also be presented in the form of an approval task.

Note: The Text Tray option available on the change request Toolbar enables the user to quickly populate text tray entries into the **Description** on the main Change Request page.

See [Understanding Change Request Management](#).

Collect Attributes for Change Request Page

Use the Collect Attributes for Change Request page (RG_ATTR_PROD_SEC) to add or edit attributes to be associated for each installed product on a change request.

Navigation:

HelpDesk > Add Change Request

Click the **Collect Attributes** icon on the Manage Product grid of the main Change Request page.

This example illustrates the fields and controls on the Change Request: Collect Attributes for Change Request page.

Collect Attributes for Change Request

Product ID	IT1026	Description	Compass Notebook PC with DVD

Processor

Processor

Processor Count

Processor Speed

Memory

RAM (MB)

Video RAM (MB)

Operating System

Operating System

Enter the desired attribute values for each installed product (asset) entry listed on the Change Request page. When a change request is saved with a **Status** set to a **Category** of *Closed*, any non-blank attribute values from the change request will be copied to the identically named attributes of the corresponding installed product entry.

Attributes are user-defined and are associated independently to each permitted component. Only attributes that are associated to both the Change Request and Installed Product components (with similar conditions, if any) will be considered when updating the installed product attributes upon saving a closed change request.

See “Understanding Attributes” (Automation and Configuration Tools).

Add Change Request Page

Use the Add Change Request page (RG_CHANGE_REQ_SS) to add new change requests in HelpDesk Self-Service.

Navigation:

Employee Self-Service > HelpDesk > Add Change Request

This example illustrates the fields and controls on the Add Change Request page.

Add Change Request

Enter the appropriate information below. To submit your change request, click the Submit button.

Requester Information

***Business Unit** IT Help Desk

Requester Stu Marx

Phone

Change Request

Status New

***Request Type** Hardware

Sub Type Desktop

***Priority** Low

***Product** Compass Notebook PC with DVD

***Summary** Request memory upgrade

Details Need more memory to run multiple applications: please add 2 gig memory

Submit

* Required Field

Use the fields on this page to define the nature of the change you are proposing. Many of the fields in the Change Request section are dependent on each other in that the values change based on your previous selection. Click **Submit** when you are finished.

Manage Change Requests Page

Use the Manage Change Requests page (RG_CHANGE_SS_SRCH) to search for and access change requests in HelpDesk Self-Service.

Navigation:

Employee Self-Service > HelpDesk > Manage A Change Request

This example illustrates the fields and controls on the Manage Change Requests page.

Manage Change Requests

Choose a predefined search criteria and click search.

Search Criteria

Name Display **Stu Marx**
*Predefined Search **All my change requests**

Search

Changes				
Personalize Find				
Change Request	Summary	Owner	Status	Date Created
400006	Request memory upgrade		New	11/04/2014 12:39AM

Select one of the predefined searches from the **Predefined Search** drop-down list box. Click **Search**. The system displays the change requests that match the search criteria you selected. Click the link under the Change Request column to access the change request you submitted.

Managing Notes

This topic discusses how to manage notes.

Pages Used to Manage Notes

Page Name	Definition Name	Usage
Change Request - Notes Page	RG_CHANGE_NOTE	Add notes and attachments to change requests.
View Note Page	RB_VIEW_NOTE_SEC	View the content of notes and attachments related to the change request.

Change Request - Notes Page

Use the Change Request - Notes page (RG_CHANGE_NOTE) to add notes and attachments to change requests.

Navigation:

- **HelpDesk > Add Change Request**

Click the Notes tab.

- **HelpDesk > Add Case**

Select *Change Request* from the **Related Actions** drop-down list box in the Actions section, and then select the Notes page.

This example illustrates the fields and controls on the Change Request: Notes page.

Change Request

Save | 360-Degree View | Notification | Search | Add Change Request | Clone | Correspond | Personalize

Change ID 400006 Requester Stu Marx
Priority High Type Hardware

Change Request | **Notes (1)** | Tasks (0) | History | Related Changes (0) | Related Actions (0) | Interested Parties (0)

Go To Select One...

Notes Summary

Select	Subject and Details	Attachment(s)	Added By	Date Added
☐	Awaiting approval for upgrade Requested upgrade requires approval. Approval request sent today.			05/17/2022 6:38PM

☐ Check All / Clear All

Email Note | View | Add Note

Audit History

When adding a new note to the change request, the note **Description** field may be populated using a Text Tray entry.

When using text tray in Case Note Detail (or Inbound Email Response Message Detail or Change Request Note Detail), the text tray button from the Rich Text Editor toolbar must be used instead of the button from the CRM Toolbar. Adding and undoing text tray entries by using the Merge or Undo key will still work in the usual manner (Alt+M/Alt+J functionality). In addition to clicking the button, the pop-up can also be invoked by placing the cursor within the Case Note Detail (or Inbound Email Response Message Detail or Change Request Note Detail) field and using the Alt+T hot key.

The pop-up includes a *Personalize Text Tray* hyperlink which opens the Personal Quick Key component in a new window. Note that additions, changes or deletions here will not be reflected immediately in the pop-up or by using merge hot key in the Rich Text Editor field in the current window. The next time the user enters the Case page (or Inbound Email or Change Request), these changes will be updated in the text tray.

Notes functionality is similar across all PeopleSoft CRM applications.

Related Links

“Understanding Notes and Attachments” (Application Fundamentals)

View Note Page

Use the View Note page (RB_VIEW_NOTE_SEC) to view the content of notes and attachments related to the change request.

Navigation:

Select the notes you want to view and then click the **View** button on the Change Request - Notes page.

This example illustrates the fields and controls on the View Note page.

View Note [X]

Help

Change ID 400006

Notes

Added On	05/17/2022 6:38PM	Added By
Summary	Awaiting approval for upgrade	
Description	Requested upgrade requires approval. Approval request sent today.	

Return

Note: Use this page to view notes and attachments related to the change request. Click **Return** to go back to the Notes page.

Managing Tasks

This topic discusses how to manage tasks.

Page Used to Manage Tasks

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Change Request - Tasks Page</u>	RG_CHG_TASKS	Manage tasks in PeopleSoft Change Management.

Change Request - Tasks Page

Use the Change Request - Tasks page (RG_CHG_TASKS) to manage tasks in PeopleSoft Change Management.

Navigation:

- **HelpDesk > Add Change Request**

Click the **Tasks** tab.

- **HelpDesk > Add Case**

Select *Change Request* from the **Related Actions** drop-down list box in the **Actions** section, and then select the **Tasks** tab.

This example illustrates the fields and controls on the Change Request: Tasks page.

Change Request History Select One...

Save | 360-Degree View | Notification | Search | Previous | Next | Add Change Request | Clone | >> | Personalize

Change ID 400003 Requester Robert Harrison
Priority Medium Type Hardware

Change Request | Notes (0) | **Tasks (18)** | History | Related Changes (0) | Related Actions (0) | Interested Parties (2)

Tasks Details | Tasks Hierarchy | Go To Select One...

Task	Task Group	Phase	Status	Assignee	Start Date	End Date	
1187-Verify Request	400027	Assessment	Open	Assignee List	05/21/2007	05/22/2007	
1188-Assess Risk	400027	Assessment	Open	Assignee List	05/21/2007	05/22/2007	
1189-Categorize Request	400027	Assessment	Open	Assignee List	05/21/2007	05/22/2007	
1190-Technical Approval	400028	Approval	Open	Joe Dillon	05/23/2007	05/28/2007	
1191-User Approval	400028	Approval	Open	Joe Dillon	05/23/2007	05/28/2007	
1192-Assign Resources	400029	Preparation	Open	Assignee List	05/29/2007	06/12/2007	
1193-Create User Communication Plan	400029	Preparation	Open	Assignee List	05/29/2007	06/12/2007	
1194-Create Backout Plan	400029	Preparation	Open	Assignee List	05/29/2007	06/12/2007	
1195-Create Test Plan	400029	Preparation	Open	Assignee List	05/29/2007	06/12/2007	
1196-Procure New Server	400029	Preparation	Open	Assignee List	05/29/2007	06/12/2007	
1197-Schedule Downtime	400030	Scheduling	Open	Assignee List	06/13/2007	06/28/2007	
1198-Notify Users	400030	Scheduling	Open	Assignee List	06/13/2007	06/28/2007	
1199-Replace Email Server	400031	Implementation	Open	Assignee List	06/29/2007	07/18/2007	
1200-Execute Test Plan	400031	Implementation	Open	Assignee List	06/29/2007	07/18/2007	
1201-Notify Users	400031	Implementation	Open	Assignee List	06/29/2007	07/18/2007	

Add a Task View

Adding tasks in PeopleSoft Change Management is similar to the process that is used in PeopleSoft Support and HelpDesk. For instructions on using the Tasks page, see [Adding Tasks to a Case](#) and “Managing Tasks” (Automation and Configuration Tools).

Reviewing Change Request History

This topic discusses how to review change request history.

Pages Used to Review Change Request History

Page Name	Definition Name	Usage
Change Request History - Events Page	RG_CHG_HISTORY	View a summary of important events in the life cycle of a change request.
Change Request History - Audit Page	RG_CHG_HISTORY	View detailed information about changes to specific fields in the change request.

Understanding Change Request History

The Change Request History page includes an Events subpage and an Audit subpage:

- Change request history provides a summary of the major events in the life cycle of a change request.
- Change request auditing complements change request history processing by providing an automated mechanism for keeping a detailed change history without cluttering the Change Request History page.

Some overlap is acceptable in the data that these pages capture.

Change Request History Page

This page displays information about major events in the life of the change request, including a description of the event and details of any field changes that are associated with the event. The following mechanisms insert data into the change request history table:

- Change Request History AAF policy.

At save time, the system evaluates record- and field-level conditions that you define. When the condition is true, the system adds a row of change request history data.

- Workflow AAF policy (including service-level workflow).

The system triggers a workflow action under conditions that you define. The event processing definition includes a check box that you select if you want to create change request history when the workflow is triggered.

- Manual notifications.

The system adds change request history whenever a user sends a manual notification from the change request.

See “Understanding Manual Notifications” (Automation and Configuration Tools).

Audit History Page

This page displays record-level changes to change request data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). However, there is no conditional logic to evaluate the before and after values of the field. The system captures all audited actions regardless of the field value.

Related Links

“Understanding Audit Information” (Application Fundamentals)

“Understanding AAF” (Automation and Configuration Tools)

“Understanding Interactions” (Application Fundamentals)

Prerequisite

Your organization must define event sets that tell the system which events to capture on the Change Request - History page.

Related Links

- “Understanding Audit Information” (Application Fundamentals)
- “Case History Configuration Page” (Automation and Configuration Tools)

Change Request History - Events Page

Use the Change Request History - Events page (RG_CHG_HISTORY) to view a summary of important events in the life cycle of a change request.

Navigation:

- HelpDesk > Add Change Request**
Select the **Show more tabs** button and then click the History page.
- HelpDesk > Add Case**
Select *Change Request* from the **Related Actions** drop-down list box in the Actions section. Select the **Show more tabs** button. Select the History page.

This example illustrates the fields and controls on the Change Request History - Events page.

Change Request

History | Select One...

Save | 360-Degree View | Notification | Search | Previous | Next | Add Change Request | Clone | >> | Personalize

Change ID 400003 | Requester Robert Harrison | Priority Medium | Type Hardware

Change Request | Notes (0) | Tasks (18) | History | Related Changes (0) | Related Actions (0) | Interested Parties (2)

Events | Interactions | Audit

Go To | Select One...

Events

Personalize | Find | View All | 1-5 of 7 | First | Last

Date	Details	Name
06/27/2007 2:08AM	Change Request status changed to Approved. Email sent to Requester.	
06/27/2007 2:08AM	Status changed to Approved. Email sent to Change Owner and Interested Parties.	
06/27/2007 2:08AM	All tasks tied to phase of NULL are now complete. Email sent to Change Owner.	
06/27/2007 2:10AM	All tasks tied to phase of NULL are now complete. Email sent to Change Owner.	
06/27/2007 2:19AM	All tasks tied to phase of NULL are now complete. Email sent to Change Owner.	

Refresh

Audit History

Field or Control	Description
Audit	Click to display the Audit History page.
Events	Describes the event. These fields are either populated through AAF processing or whenever a user sends a manual notification from the change request.

Change Request History - Audit Page

Use the Change Request History - Audit page (RG_CHG_HISTORY) to view detailed information about changes to specific fields in the change request.

Navigation:

Click the **Audit** link on the Change Request History page.

This example illustrates the fields and controls on the Change Request History - Audit page.

Change Request

Save

360-Degree View

Notification

Text Tray

Search

>>

Personalize

Change ID 400003

Priority Medium

Requester Robert Harrison

Type Hardware

Change Request

Notes (0)

Tasks (18)

History

Related Changes (0)

Related Actions (0)

Events

Interactions

Audit

Go To Select One...

Audit History

CustomizeFindView All1-5 of 5Last

Record Name	Field Name	Action Taken	Date and Time Stamp	Changed By	Value Before Change	Value After Change
RG_CHANGE_REQST	RG_SUMMARY	Change Old (PPR Only)	07/07/2007 9:56:49AM PDT		Change Request created with BU as IT HELPDESK	Change Request For a Hardware Upgrade
RG_CHANGE_REQST	DESCRLONG	Change Old (PPR Only)	07/07/2007 9:56:49AM PDT			Change Request For a Hardware Upgrade
RG_CHANGE_REQST	END_DT	Change Old (PPR Only)	06/28/2007 11:16:33PM PDT			2007-08-08
RG_CHANGE_REQST	BO_ID_OWNER	Change Old (PPR Only)	06/27/2007 2:19:47AM PDT		0	20098
RG_CHANGE_REQST	RG_CATEGORY	Change Old (PPR Only)	06/27/2007 2:10:48AM PDT		SIGN	MINR

Refresh

Audit History

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting).

Managing Related Changes

This topic discusses how to manage related changes.

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Page Used to Manage Related Changes

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Change Request - Related Changes Page	RG_REL_CHANGES	Relate your change request to another change request.

Change Request - Related Changes Page

Use the Change Request - Related Changes page (RG_REL_CHANGES) to relate your change request to another change request.

Navigation:

- **HelpDesk > Add Change Request**

Click the **Related Changes** tab.

- **HelpDesk > Add Case**

Select *Change Request* from the **Related Actions** drop-down list box in the Actions section, and then select the Related Changes page.

This example illustrates the fields and controls on the Change Request: Related Changes page.

Change Request History Select One...

Save | 360-Degree View | Notification | Search | Previous | Next | Add Change Request | Clone | >> | Personalize

Change ID 400003 **Requester** Robert Harrison
Priority Medium **Type** Hardware

Change Request | Notes (0) | Tasks (18) | History | **Related Changes (1)** | Related Actions (0) | Interested Parties (2)

Go To Select One...

Related Changes

Relationship	Type	Change ID	Summary	Status	Date and Time Added	Added By	
Equivalent	Equivalent	400001	Change Request For a Hardware Upgrade	New	11/10/2014 1:45AM	Oprid for CRMSKT, CRMQABAK	

Add Related Change

Audit History

Managing related changes in PeopleSoft Change Management is similar to the process that is used to manage related cases, which is described the documentation for PeopleSoft Support and HelpDesk.

Related Links

[Managing Related Cases](#)

Managing Related Actions

This topic discusses how to manage related actions.

Page Used to Manage Related Actions

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Change Request - Related Actions Page	RG_REL_OBJECTS	Relate actions to the change request.

Change Request - Related Actions Page

Use the Change Request - Related Actions page (RG_REL_OBJECTS) to relate actions to the change request.

Navigation:

- HelpDesk, Add Change Request

Click the Related Actions tab.

- **HelpDesk > Add Case**

Select *Change Request* from the **Related Actions** drop-down list box in the Actions section, and then select the Related Actions page.

This example illustrates the fields and controls on the Change Request - Related Actions page.

The screenshot shows the 'Change Request' page with the 'Related Actions' tab active. The page header includes 'Change Request' and a 'History' dropdown. Below the header, there are tabs for 'Change Request', 'Notes (0)', 'Tasks (18)', 'History', 'Related Changes (1)', 'Related Actions (1)', and 'Interested Parties (2)'. The 'Related Actions' tab is selected, showing a table with one action. The table has columns for 'Type', 'Id', 'Summary', 'Date and Time Added', and 'Added By'. The action listed is 'Help Desk Case' with ID 145, summary 'Computer hangs while running a program', date 11/10/2014 1:49AM, and added by Oprod for CRMSKT, CRMQABAK. Below the table, there is a 'Type' dropdown menu and an 'Add Related Action' button. At the bottom, there is an 'Audit History' link.

Managing related actions in PeopleSoft Change Management is similar to the process that is used to manage related actions in PeopleSoft Support and HelpDesk.

Related Links

[Managing Related Actions](#)

Managing Interested Parties

This topic discusses how to manage interested parties for a change request.

Pages Used to Manage Interested Parties

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Change Request - Interested Parties Page	RG_CHG_INT_PARTY	Manage interested parties in a change request.

Change Request - Interested Parties Page

Use the Change Request - Interested Parties page (RG_CHG_INT_PARTY) to manage interested parties in a change request.

Navigation:

- HelpDesk, Add Change Request

Click the Interested Parties tab.

- **HelpDesk > Add Case**

Select *Change Request* from the **Related Actions** drop-down list box in the Actions section, and then select the Interested Parties page.

This example illustrates the fields and controls on the Change Request - Interested Parties page.

The screenshot displays the 'Change Request' page with the 'Interested Parties' tab selected. The page header includes a 'History' dropdown and navigation buttons like 'Save', '360-Degree View', 'Notification', 'Search', 'Previous', 'Next', 'Add Change Request', 'Clone', and 'Personalize'. The main content area shows the change request details: Change ID 400003, Priority Medium, Requester Robert Harrison, and Type Hardware. Below this, there are tabs for 'Change Request', 'Notes (0)', 'Tasks (18)', 'History', 'Related Changes (0)', 'Related Actions (0)', and 'Interested Parties (2)'. The 'Interested Parties' tab is active, showing a table with columns for Name, Email Address, and Phase. Two parties are listed: Terry Murphy (crm_worker_34@ap6023fems.us.oracle.com) and Spencer Underwood (sunderwood@gbi.com). There is an 'Add an Interested Party' button and an 'Audit History' link at the bottom.

Managing interested parties in PeopleSoft Change Management is similar to the process that is used to manage interested parties in PeopleSoft Support and HelpDesk.

Related Links

[Identifying Interested Parties](#)

Managing Defects and Fixes

Understanding Defect and Fix Tracking

Flaws and functional shortcomings can occur in all products. Within PeopleSoft Quality Management, both product flaws and proposed enhancements are *defects*, and resolutions to both are *fixes*.

Use PeopleSoft Quality Management to track reported defects and enhancement requests and to record how requests are resolved. Automated worklist assignments and notifications move the defect through the resolution process. Managers, engineers, call center operators, and others can use the search tool to quickly identify and access records.

Use PeopleSoft Quality Management to:

- Identify defects associated with particular products or components.
- Monitor the progress of defects as they move forward to resolution.
- Advise support personnel and customers about fixes that have not yet been applied.
- Identify component problems affecting multiple products or versions.
- Log product enhancement requests made by customers and quality assurance engineers.
- Monitor requirements for quality certification processes such as ISO 9000.
- Measure product quality, identify defect trends, and assess customer satisfaction.

You can maintain a record of fixes to facilitate quick resolutions to similar defects and related cases. Use the record of fixes to:

- Reduce the possibility of fixing the same problem twice.
- Provide links to other defect records and quickly identify similar problems.
- Provide a detailed history of when a defect was fixed, the effort involved, and the versions affected.

Entering Defects

This topic discusses how to enter defects.

Pages Used to Enter Defects

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Quality Management - Defect Page</u>	RQ_DEFECT_MAIN	Enter detailed information about the defect, product, responsible parties, interested parties, environment, and defect resolution.
<u>Quality Management - Notes Page</u>	RQ_DEFECT_NOTE	Add notes and attachments to a defect, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.
<u>Quality Management - Fixes Page</u>	RQ_DEFECT_FIX_LNKS	Link new or existing fixes to a defect.
<u>Quality Management - Solutions Page</u>	RQ_DEFECT_SOL_LNK2	Search for solutions to the defect or problem.
<u>Quality Management - Products Affected Page</u>	RQ_DEFECT_AFFD_PRD	Identify and enter information about additional products that are affected by the defect. You can list multiple products.
<u>Quality Management - Interested Parties Page</u>	RQ_DEFECT_INTR	Identify people who want to be notified regarding defect resolution progress.
<u>Quality Management - Related Actions Page</u>	RQ_DEF_CASE_LNK	Link the defect to related support or help desk cases.
<u>Quality Management - Related Defects Page</u>	RQ_DEF_RELATIONS	View information about related defects, associate defects that can be resolved by the same fix, and identify defects that must be resolved in a particular sequence.
<u>Relate Existing Defect - Relationship Page</u>	RQ_REL_TYPE_SEC	Specify how defects are related to one another.
<u>Quality Management - Tested Environments Page</u>	RQ_DEFECT_TEST_ENV	Identify and enter information about the environments in which the defect will be tested.
<u>Quality Management - Workflow History Page</u>	RQ_WL_ACTN_HISTORY	View workflow status and priority history resulting from worklist notifications.

Quality Management - Defect Page

Use the Quality Management - Defect page (RQ_DEFECT_MAIN) to enter detailed information about the defect, product, responsible parties, interested parties, environment, and defect resolution.

Navigation:

Quality Management > Add Defect > Defect

Quality Management > Search Defects > Defect

This example illustrates the fields and controls on the Quality Management - Defect page (1 of 2).

Quality Management

Save

Refresh

Add Defect

Notification

Clone

Search

Personalize

Defect Id

DEF000000300001

Status

OPEN

Priority

Medium

Defect

Notes

Fixes

Solutions

Products Affected

Interested Parties

Related Actions

Related Defects

Tested Environments

Defect Information

*Date Reported

09/29/2014

Business Unit

High Tech

Reported By

Alex Zulli

*Status

Open

*Type

Defect

*State

To Test

*Subject

The power supply in an affected 8200 Series Router may short out if the unit is turned on its side during operation.

*Reason

Fixed

*Priority

Medium

Severity

High

Description

138 characters remaining
When the power supply is shorted out, the 8200 Series Router will cease functioning immediately or will fail to power on after being turned on at a later time.

Duplicate of

Date Resolved

Duplicate Subject

Product Information

*Product

GBI 8200 Series Router

*Product Impact

Unusable

*Production ID

8200 SERIES V1

Phase

Production

Version

8200 Series Version 1

Suspect. Cause

Materials

Component ID

AC POWER SUPPLY

Repeatability

Reproducible

*Symptom

Power/Electrical problems

Verified On

Verified By

Alex Zulli

This example illustrates the fields and controls on the Quality Management - Defect page (2 of 2).

Responsible Parties Personalize | Find | 1-5 of 5 | First | Last

Name	Role
Alex Zulli	Call Center Agent
Colleen Mott	Quality Development Manager
Jake Lu	Quality Developer
Jake Lu	Quality Analyst
Maggie Stone	Quality Manager

Currently assigned to this defect Add a Responsible Party

Environment

OS	Windows NT	Label	GBI Netplus V9.1
Platform	HP 9000	OS Version	
UI		Environment	MS SQL Server
		Network	NetWare v3.x

Audit History

Created	10/11/2002 5:11PM PDT	By	HITECHSAMPLE Cletus Byrne
Modified	10/01/2014 2:02AM PDT	By	VP1 Stu Marx

* Required Field

The Quality Management - Defect page contains information relevant to problem reporting and resolution. As the defect moves through to the resolution process, you can track its status on this page.

Defect Information

Field or Control	Description
Date Reported	Enter the date on which the defect or enhancement request is reported.
Reported By	Select the name of the person reporting the defect or enhancement request. The name of the user who opened the defect issue appears by default.
Type	Select a type. Values are: <i>Defect:</i> Relates to a problem or malfunction. The standard response to a defect is a fix. <i>Enhancement:</i> Relates to a request for new functionality. The standard response to this request is an enhancement.
Subject	Enter details about the defect being reported.
Status	Select the status of the defect or enhancement request. PeopleSoft delivers <i>Open</i> and <i>Closed</i>. You can define other options during setup.

Field or Control	Description
State	Select a state that more fully describes your status selection. The system delivers several options. You can change these options or define others during setup. Available states are dynamic depending on the selected status.
Reason	Select a reason that further describes the status and state selections. Available reasons are dynamic depending on the selected status and state.
Priority	Select a priority for the defect. PeopleSoft delivers <i>High</i> , <i>Low</i> , and <i>Medium</i> with the system.
Severity	Select the severity of the defect. PeopleSoft delivers <i>High</i> , <i>Low</i> , and <i>Medium</i> with the system.
Duplicate of	If similar defect or enhancement requests already exist, select the principal defect here to designate the current defect as a duplicate of the principal defect. For example, if, after creating a new defect record, you find that a defect has already been reported but not described in quite the same way, specify the current record as a duplicate of the previous record and change the status of the current record to closed.

Product Information

Field or Control	Description
Product	Select the product to which the defect or enhancement request relates. Note: Only products with a valid version definition, established in PeopleSoft Quality Management setup, appear in the search. If a product does not appear, a version for that product must be established in setup.
Production ID	Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search. When you select a valid production ID, the system automatically fills in the version in the Version field.

Field or Control	Description
Version	Once a user selects a production ID, the system automatically displays the version label.
Component ID	Click the Component Hierarchy button to access the Component Descriptions page and select the appropriate component.
Symptom	Select a symptom that may have alerted you to the defect. Define symptoms in PeopleSoft Quality Management setup.
Product Impact	Describe the impact of the defect on your component. Values are: <i>Affected - Use Workaround</i> , <i>Degraded</i> , <i>Unaffected</i> , and <i>Unusable</i> .
Phase	Select the production phase in which the product failure or enhancement request occurred. Values are: <i>Alpha</i> , <i>Analysis/Design</i> , <i>Beta</i> , <i>Concept</i> , <i>Implementation</i> , <i>Maintenance</i> , <i>Production</i> , <i>Requirements</i> , and <i>Retirement</i> .
Suspect. Cause (suspected cause)	Select a suspected cause of the defect. Define suspected causes in PeopleSoft Quality Management setup.
Repeatability	Select the regularity with which the failure can be reproduced. Values are: <i>Intermittent</i> , <i>One time occurrence</i> , <i>Recurring</i> , and <i>Reproducible</i> .

Responsible Parties

Responsible parties are those who take the lead for one or more steps in the defect resolution process and are linked to the product version definition during version setup. These values are automatically populated when a user selects the product version. You can add or delete responsible parties as needed.

You can use information about responsible parties to control search functions and role-related workflow. To modify workflow processing use AAF policies.

Field or Control	Description
Currently assigned to this defect	Select this option to indicate who is responsible for the defect's progress at any point. For example, if the current state of the defect resolution is <i>To Test</i>, the person assigned would be the quality analyst. When defined, the system sends workflow messages as the status is changed and saved. Note: Selecting an assignment is a manual process. You can select only one name as the responsible party at any point. As the defect-resolution process progresses, the responsible party changes.
Add a Responsible Party	Click to add a new row to the Responsible Parties grid.

Environment

This section is used primarily for software problems.

Field or Control	Description
OS (operating system)	Select the operating system of the environment in which the product failed if it is not automatically populated, or to modify operating system information.
Label	Enter the environment information that is linked to the version during version setup. Note: If there are multiple environment sets linked to a version, the Select an Environment button appears. Also, if only one environment exists that is linked to the versions, the system automatically inserts values into the fields on the page.
Platform	Select the type of computer on which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify platform information.
OS Version (operating system version)	Enter the version of the environment in which the product failed if it is not automatically populated, or to modify operating system information.
UI (user interface)	Select the type of user interface through which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify user interface information.

Field or Control	Description
Environment	Select the database management environment in which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify environment information.
Network	Select the type of network on which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify network information.

Quality Management - Notes Page

Use the Quality Management - Notes page (RQ_DEFECT_NOTE) to add notes and attachments to a defect, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

Navigation:

Quality Management > Add Defect > Notes

Quality Management > Search Defects > Notes

This example illustrates the fields and controls on the Quality Management - Notes page.

The screenshot shows the 'Quality Management' interface. At the top, there are buttons for 'Save', 'Refresh', 'Add Defect', 'Notification', 'Clone', and 'Search'. Below these, the 'Defect Id' is 'DEF000000300001' and the 'Status' is 'OPEN'. The 'Priority' is 'Medium'. There are several tabs: 'Defect', 'Notes', 'Fixes', 'Solutions', 'Products Affected', 'Interested Parties', 'Related Actions', 'Related Defects', and 'Tested Environments'. The 'Notes' tab is selected, showing a 'Notes Summary' section. This section has a table with columns: 'Select', 'Subject and Details', 'Attachment(s)', 'Added By', and 'Date Added'. There is one note listed: 'Need to replace router Router defective - replace and test', added on '10/01/2014 12:25AM'. Below the table, there are buttons for 'Email', 'View', and 'Add Note'.

The process of adding notes and attachments is similar across all PeopleSoft applications.

For instructions on adding notes and attachments, see “Understanding Notes and Attachments” (Application Fundamentals).

Quality Management - Fixes Page

Use the Quality Management - Fixes page (RQ_DEFECT_FIX_LNKS) to link new or existing fixes to a defect.

Navigation:

Quality Management > Add Defect > Fixes

Quality Management > Search Defects > Fixes

This example illustrates the fields and controls on the Quality Management - Fixes page.

Quality Management

SaveRefresh

Add DefectNotificationCloneSearch

Personalize

Defect Id DEF000000300001

Status OPEN

Priority Medium

Defect

Notes

Fixes

Solutions

Products Affected

Interested Parties

Related Actions

Related Defects

Tested Environments

Fixes Linked To This Defect

PersonalizeFind

First1 of 1Last

Fix ID

Subject

FIX000000300001

The power supply in an affected 8200 Series Router may short out if the unit is turned on its side during operation

Add a Link to Fix

Search Fixes

As fixes are implemented to resolve the defect, use the Quality Management - Fixes page to both create a fix and link the defect to the fix. This provides an immediate link to all fixes that resolve the defect in full or in part. Alternately, link the defect to the fix using the Quality Management - Defects page in the Fix component. Having fix information linked to a defect record enables call center operators to refer customers to available fixes that might not have been installed.

PeopleSoft Search is used to perform search on fixes. Refer to “Understanding PeopleSoft Search Framework Definitions for CRM” (Automation and Configuration Tools) and “Understanding PeopleSoft Search Framework Definitions for CRM” (Automation and Configuration Tools) topics for more information on using PeopleSoft Search in CRM.

Field or Control	Description
Subject	Displays the subject description associated with the fixes linked to this defect. The system populates this field with the subject information that you entered on the Quality Management - Fix page in the Fix component.

Quality Management - Solutions Page

Use the Quality Management - Solutions page (RQ_DEFECT_SOL_LNK2) to search for solutions to the defect or problem.

Navigation:

- Quality Management > Add Defect > Solutions
- Quality Management > Search Defects > Solutions

This example illustrates the fields and controls on the Quality Management - Solutions page.

Quality Management

Save Refresh | Add Defect | Notification | Clone | Search Personalize

Defect ID DEF000000300001 Status OPEN
Priority Medium

Defect Notes Fixes **Solutions** Products Affected Interested Parties Related Actions Related Defects Tested Environments

Attempted Solutions Personalize Find View All | First 1 of 1 Last

Select	Solution ID	Description	Date Modified	Added By	Status
☐	301236	Troubleshooting tips for router hang This solution helps troubleshoot a router that is not responding, the cause, and what shou...	10/01/2014 12:09:00AM PDT		In Consideration

View

Solutions

Search Text router troubleshooting tips Search Advanced Search Search Tips Preferences

Your search returned 2 result(s). Personalize Find View All | First 1-2 of 2 Last

Select	Score%	Type	ID	Description
☒	27	Solution	301236	Troubleshooting tips for router hang This solution helps troubleshoot a router that is not responding, the cause, and what shou... More like this...
☐	27	Solution	301237	Troubleshooting tips for router memory problems This solution explains the symptoms and possible causes of memory allocation failure (MALL... More like this...

Attempt Solve View

PeopleSoft CRM call center, field service and quality management applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

See “Understanding Solutions” (PeopleSoft Services Foundation).

Quality Management - Products Affected Page

Use the Quality Management - Products Affected page (RQ_DEFECT_AFFD_PRD) to identify and enter information about additional products that are affected by the defect.

You can list multiple products.

Navigation:

Quality Management > Add Defect > Products Affected

Quality Management > Search Defects > Products Affected

This example illustrates the fields and controls on the Quality Management - Products Affected page.

Quality Management

SaveRefreshAdd DefectNotificationCloneSearchPersonalize

Defect Id DEF000000300001Status OPEN

Priority Medium

DefectNotesFixesSolutionsProducts AffectedInterested PartiesRelated ActionsRelated DefectsTested Environments

Products Affected By This DefectFindView AllFirst1 of 1Last

ProductGBI 8200 Series RouterProduct IDHT8200

Production ID8200 SERIES V1Version8200 Series Version 1

Component IDAC POWER SUPPLYName

Test StatusFailedDetailsnot responding

Modified10/01/2014 12:37AM PDTPS

Complete this page if this defect or enhancement affects other products or components. For example, if you have a product that more than one appliance uses, use this page to list all appliances that contain the product.

Field or Control	Description
Product	Select the product in which the defect is found.
Product ID	Once you select a product, the system displays the product ID.
Production ID	Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.
Version	Once you select a production ID, the system displays the version label.
Component ID	Select the appropriate component for this product and version.
Name	Select the name of the person who found the defect.
Test Status	Select the test status. Values are: <i>Failed</i> , <i>Not Tested</i> , and <i>Passed</i> .
Details	Describe the impact of the defect on the component.

Quality Management - Interested Parties Page

Use the Quality Management - Interested Parties page (RQ_DEFECT_INTR) to identify people who want to be notified regarding defect resolution progress.

Navigation:

Quality Management > Add Defect > Interested Parties

Quality Management > Search Defects > Interested Parties

This example illustrates the fields and controls on the Quality Management - Interested Parties page.

Quality Management

Save Refresh | Add Defect | Notification | Clone | Search Personalize

Defect Id DEF000000300001 Status OPEN
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions Related Defects Tested Environments

Interested parties Personalize Find 1-2 of 2 Last

Name	Email Address
Stuart Edwards	sedwards@peoplebank_psft.com
Alex Zulli	azulli@peoplesoft.com

Add an Interested Party

Interested parties want to be notified regarding the defect resolution progress, but are not designated as responsible parties. Interested parties can be either employees or non-employees—for example, customers. As with responsible parties, information pertaining to interested parties controls role-related workflow.

Quality Management - Related Actions Page

Use the Quality Management - Related Actions page (RQ_DEF_CASE_LNK) to link the defect to related support or help desk cases.

Navigation:

Quality Management > Add Defect > Related Actions

Quality Management > Search Defects > Related Actions

This example illustrates the fields and controls on the Quality Management - Related Actions page.

Quality Management

Save Refresh | Add Defect | Notification | Clone | Search Personalize

Defect Id DEF000000300001 Status OPEN
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions Related Defects Tested Environments

Related Actions Personalize Find 1 of 1 Last

Type	ID	Summary	Date Created	Added By
Change Request	400004	Equipment needs to be replaced	10/01/2014 1:38AM	Opid for CRMSKT, CRMQABAK

Related Actions Go

Linking a defect to related cases enables call center agents to track a defect throughout the resolution process and to track cases that can be resolved by the same fix. This also enables quality assurance analysts to gain additional information about a case.

Field or Control	Description
Type	Displays the type of related action.
ID	Displays the ID of the related action.
Summary	Displays the details of the action.
Date and Time Added	Displays the date and time when the action and the defect were linked.
Added By	Displays the name of the person who linked the action to the defect.
Type	Select the type of action to relate. Values include <i>Case</i> , <i>Change Request</i> , and <i>Create Change Request</i> . Selecting <i>Create Change Request</i> and clicking the Add Related Action button takes you to the Change Request page.

Quality Management - Related Defects Page

Use the Quality Management - Related Defects page (RQ_DEF_RELATIONS) to view information about related defects, associate defects that can be resolved by the same fix, and identify defects that must be resolved in a particular sequence.

Navigation:

Quality Management > Add Defect > Related Defects

Quality Management > Search Defects > Related Defects

This example illustrates the fields and controls on the Quality Management - Related Defects page.

Quality Management

Save Refresh | Add Defect | Notification | Clone | Search Personalize

Defect Id DEF000000300001 Status OPEN
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions **Related Defects** Tested Environments

Related Defects Personalize Find | First 1 of 1 Last

Relationship	Type	Defect	Subject	Date and Time Added	Added By
Child	Common	DEF000000300003	Improve bandwidth limiting and traffic shaping capabilities on the GBI 6400 VPN Router	10/01/2014 12:32AM	

Relate a Defect

Use the Quality Management - Related Defects page to view other defects that have been linked to the subject defect. Also, link new defects by clicking the **Relate a Defect** button.

Field or Control	Description
Relate a Defect	Click to access the Relate Existing Defect page and link an existing defect record to the new defect.

Relate Existing Defect - Relationship Page

Use the Relate Existing Defect - Relationship page (RQ_REL_TYPE_SEC) to specify how defects are related to one another.

Navigation:

Quality Management > Add Defect > Related Defects. Click the Relate Existing Defect button.

Quality Management > Search Defects Click the Relate Existing Defect button.

This example illustrates the fields and controls on the Relate Existing Defect page.

Relate Existing Defect

Define Relationship

Select the relationship characteristics between Defect DEF000000300001 and Defect DEF000000300003.

*Relationship Type

Common

*DEF000000300001

Parent

*DEF000000300003

Child

OK

Cancel

* Required Field

Linking related defects shows how a defect affects or is affected by other defects. For example, the hard drives on the new computer model that you are building can't be accessed. The floppy drives on the new model can't be accessed either. As the engineers study the problems, they find that the controller module on the motherboard is designed incorrectly and is responsible for the drive problems. The engineers enter a third defect record and link the two drive defect records as children to the motherboard defect.

Field or Control	Description
Relationship Type	Select the appropriate relationship type to describe the relationship between the defects. You define relationship types in setup. PeopleSoft provides sample values. You can change them or add new values to fit your needs. Also, select the labels that describe the role of each defect in the relationship. For example, use a relationship type of <i>Common</i> to indicate that a defect in one component causes a defect in another component. In this example, the defect in the first component that causes the problem in the second component is the <i>Parent</i>, while the second defect is the <i>Child</i>. If problems in two or more components are caused by the same defect but there is not a parent and child relationship, the relationship type is <i>Equivalent</i> and all linked defects are <i>Equal</i>. Note: All relationship-type labels that are established under a particular setID appear. However, you can select and save labels appropriate to the specified relationship type only.

Quality Management - Tested Environments Page

Use the Quality Management - Tested Environments page (RQ_DEFECT_TEST_ENV) to identify and enter information about the environments in which the defect will be tested.

Navigation:

Quality Management > Add Defect > Tested Environments

Quality Management > Search Defects > Tested Environments

This example illustrates the fields and controls on the Quality Management - Tested Environments page.

Quality Management

Save Refresh | Add Defect | Notification | Clone | Search Personalize

Defect Id DEF000000300001 Status OPEN
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions Related Defects Tested Environments

Environments in which this defect has been tested Find View All First 1 of 1 Last

Environment Label NETWORK OPS Type Reproduced
OS Unix OS Version
Environment DB2 Platform HP 9000
Network Winsock TCP/IP UI
Name
Details router problem - missing packets

Date Created 10/01/2014 12:34AM PDT
Last Modified 10/01/2014 12:34AM PDT

For software defects, it is important to know which environments the defects occurred in. Enter details about as many environment combinations as needed.

Field or Control	Description
Environment Label	Enter a name to identify the tested database management system environment.
Type	Select an environment type, which relates to reproduction status. Values are: <i>Not Reproduced</i> , <i>Partially Reproduced</i> , and <i>Reproduced</i> .
OS (operating system) and OS Version (operating system version)	Select or enter the operating system and version of the test environment.
Environment	Select the database management system environment in which the test component resides.
Platform	Select the computer processor type.
Network	Select the type of network on which users utilize the product.
UI (user interface)	Select the type of user interface through which users access the component.
Name	Select the person who conducted the testing in the stated environment.
Description	Describe the testing environment or the tests that were conducted.

Quality Management - Workflow History Page

Use the Quality Management - Workflow History page (RQ_WL_ACTN_HISTORY) to view workflow status and priority history resulting from worklist notifications.

Navigation:

Quality Management > Add Defect > Workflow History

Quality Management > Search Defects > Workflow History

This example illustrates the fields and controls on the Quality Management - Workflow History page.

Quality Management

Save

Refresh

Add Defect

Notification

Clone

Search

Personalize

Defect Id

 DEF000000300001

Status

 OPEN

Priority

 Medium

Fixes

Solutions

Products Affected

Interested Parties

Related Actions

Related Defects

Tested Environments

Workflow History

Work list Routing History

Personalize

Find

View All

First

1 of 1

Last

Date/Time	From	To	Priority	Status	State

Refresh Grid

The **Worklist Routing History** grid displays a record of all workflow related to defect record status changes.

Field or Control	Description
Date/Time	Displays the date and time when a worklist notification was saved.
From User and To User	Displays the users who triggered and received the worklist notification.
Priority, Status, and State	Displays the priority code, status, and status state of the defect when the worklist notification was saved.
Refresh Grid	Click to reflect recent changes to workflow history.

Recording Fixes and Linking Them to Defects

This topic discusses how to record fixes and link them to defects.

Pages Used to Record Fixes and Link Them to Defects

Page Name	Definition Name	Usage
Quality Management - Fix Page	RQ_FIX_MAIN	Enter and update detailed information about a fix.
Quality Management - Defects Page	RQ_FIX_DEFECT_LNKS	Link defects with fixes. You can link multiple defects to a single fix.
Quality Management - Notes Page	RQ_FIX_NOTE	Add notes and attachments to a fix, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

Quality Management - Fix Page

Use the Quality Management - Fix page (RQ_FIX_MAIN) to enter and update detailed information about a fix.

Navigation:

Quality Management > Add Fix > Fix

Quality Management > Search Fixes > Fix

This example illustrates the fields and controls on the Quality Management - Fix page.

Quality Management

Save Refresh | Add Fix | Notification | Clone | Search Personalize

Fix ID: FIX000000300001 Subject: The power supply in an affected...

Fix Defects Notes

Fix Information

*Subject: The power supply in an affected 8200 Series Router may short out if the unit is turned on its side during operation. 139 characters remaining

Description: When the power supply is shorted out, the 8200 Series Router will cease functioning immediately or will fail to power on after being turned off at a later time. There is no safety hazard; the electric discharge is contained within the power supply. Some 8200 Series Router models manufactured from November 2001 through February 2002 have defective AC power supplies. The workaround is to avoid repositioning the 8200 Series Router while it is powered on. Especially avoid turning the unit on its side.

Business Unit: High Tech

Product Information

*Product: GBI 8200 Series Router

Production ID: 8200 SERIES V1

Version: 8200 Series Version 1

Component ID: AC POWER SUPPLY

Complexity: Easy

Fix Time (Hrs.Mins): 0.50

Completed By: Alex Zulli

Completed On: 10/01/2002

Resolution Information

Test Status: Passed

Confidence: High

Verified By: Alex Zulli

Verified On: 10/01/2002

Production ID

First Found In: 8200 SERIES V1

Fixed In: 8200 SERIES V1

Verified In: 8200 SERIES V1

Audit History

Created: 10/11/2002 5:21PM PDT By: HITECHSAMPLE Cletus Byrne

Modified: 10/11/2002 5:59PM PDT By: HITECHSAMPLE Cletus Byrne

* Required Field

Field or Control	Description
Subject	Enter a brief description of the fix.
Completed By	Select the person who completed the fix.
Test Status	Select the testing status of the fix. Values are: <i>Failed</i> , <i>In Progress</i> , <i>Partially Passed</i> , <i>Passed</i> , and <i>Pending</i> .
Fix Time (Hrs. Mins) (fix time [hours and minutes])	Enter the approximate time required to complete the fix.
Complexity	Select the level of fix complexity. Values are: <i>Easy</i> , <i>Medium</i> , <i>Trivial</i> , and <i>Very Complex</i> .

Field or Control	Description
Confidence	Select the level of confidence in the fix. Values are: <i>High</i> , <i>Low</i> , and <i>Medium</i> .
Product	Select the product to which the fix applies.
Verified By	Select the name of the person who verified that the fix was successful.
Production ID	Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.
Version	Once you select a production ID, the system automatically displays the version label.
Component ID	Select the component for which the fix applies.
Verified On	Select the date of the verification.
First Found In	Select the product version in which the defect was first reported.
Fixed In	Select the product version in which the fix was first successfully applied.
Verified In	Select the product version in which the fix was first successfully tested.

Note: Several of the fields on this page enable you to distinguish between product versions. For example, a flaw in a piece of software code might be introduced into a program in one version (the **Production ID** field) but not discovered until a later version (the **First Found In** field). That same flaw might not be fixed until an even later version (the **Fixed In** field) is issued. By noting the program version in which the problem was introduced, you know to provide the fix to customers who are still using earlier versions.

Quality Management - Defects Page

Use the Quality Management - Defects page (RQ_FIX_DEFECT_LNKS) to link defects with fixes.

You can link multiple defects to a single fix.

Navigation:

Quality Management > Add Fix > Defects

Quality Management > Search Fixes > Defects

This example illustrates the fields and controls on the Quality Management - Defects page.

Quality Management

SaveRefresh

Add FixNotificationCloneSearch

Personalize

Fix ID

FIX000000300001

Subject

The power supply in an affecte...

Fix

Defects

Notes

Defects Linked To This Fix

PersonalizeFind

First1 of 1Last

Defect ID	Subject
DEF000000300001	The power supply in an affected 8200 Series Router may short out if the unit is turned on its side during operation.

Add a Link to Defect

Search Defects

As fixes are implemented, use the Defects page to link the fix to one or more defects. This provides an immediate link to all reported defects resolved in full or in part by the fix. Alternately, you can link the fix to the defect using the Fixes page in the Defects component.

PeopleSoft Search is used to perform search on defects. Refer to “Understanding PeopleSoft Search Framework Definitions for CRM” (Automation and Configuration Tools) and “Understanding PeopleSoft Search Framework Definitions for CRM” (Automation and Configuration Tools) topics for more information on using PeopleSoft Search in CRM.

Field or Control	Description
Subject	Displays the subject of the selected defect.
Add a Link to Defect	Click to add a new row to the Defects Linked To This Fix grid.

Quality Management - Notes Page

Use the Quality Management - Notes page (RQ_FIX_NOTE) to add notes and attachments to a fix, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

Navigation:

Quality Management > Add Fix > Notes

Quality Management > Search Fixes > Notes

The process of adding notes and attachments is similar across all PeopleSoft applications.

For instructions on adding notes and attachments, see “Understanding Notes and Attachments” (Application Fundamentals).

Configuring Self-Service Applications

Understanding PeopleSoft Call Center's Self-Service Application Configuration

This topic discusses:

- Self-service application configuration.
- Contact Me notifications.
- Live chat.
- Association of solutions with case closure reasons.
- Search descriptions for predefined searches.
- Troubleshooting guide and FAQ configuration.

Self-Service Application Configuration

Central to the self-service configurability options are display templates. When associated with the Case component, display templates control the appearance and behavior of self-service components and their pages. Implementers can show or hide pages, sections and fields, as well as adjust field labels.

Note: If you create a new display template for self-service transactions, you must define the new template for all the self-service components.

See [Setting Up Basic Prompt Tables for Cases](#).

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

See [Understanding Call Center Business Units](#)[Understanding Display Templates](#).

RC_SUPPORT Display Template

The RC_SUPPORT, CRM_COM, CRM_ENG, CRM_FIN, CRM_INS and CRM_GOV display template controls these PeopleSoft Support self-service application components:

- RC_CASE_SW_SS (Support - Manage Case)
- RC_CASE_SW_SS_RPT (Support - Create Case)
- RC_CASE_SW_SS_SRCH (Support - Search Cases)
- RC_SOLNSRCH_SW_SS (Support - Search Solutions)

- RC_SS_SW (Self Service Support Desk)

RC_HELPDESK, CRM_HHD, and CRM_HE Display Templates

The RC_HELPDESK (PeopleSoft HelpDesk), CRM_HHD (PeopleSoft HelpDesk for Human Resources), and CRM_HE (PeopleSoft Service Center for Higher Education) display templates controls the following HelpDesk self-service application components:

- RC_CASE_HD_SS (HelpDesk - Manage Case)
- RC_CASE_HD_SS_RPT (HelpDesk - Create Case)
- RC_CASE_HD_SS_SRCH (HelpDesk - Search Cases)
- RC_SOLNSRCH_HD_SS (HelpDesk - Search Solutions)
- RC_SS_HD (Self Service HelpDesk Desk)

Contact Me Notifications

If you include the **Contact Me Regarding This Problem** button on the self-service application pages, ensure that clicking this button sends the appropriate notifications. PeopleSoft delivers AAF objects (trigger points, action types, and terms) to support this process.

The delivered AAF objects send notifications to the assignee (agent, provider group, or call center manager). Separate email and worklist notifications enable the system to send notifications using the recipient's preferred notification method.

Related Links

“Understanding Business Units in PeopleSoft CRM” (Application Fundamentals)

Live Chat

All self-service pages are enabled for chat. This immediate access to a live agent, if needed, encourages self-service adoption and enables organizations to eliminate potential customer frustration or abandonment by delivering real-time service.

See “Understanding Chat” (PeopleSoft Multichannel Applications).

Association of Solutions with Case Closure Reasons

Depending on system configuration, closed cases are generally associated with a successful solution. You define whether a self-service application user can close or reopen self-service application cases on the Business Unit - Options page.

When a self-service application user clicks the **Close Case** button to close a case, the Close Case page prompts the user for a reason. The system derives the successful solution from the reason that the self-service application user enters. Reason codes are tied to solutions which are then used to resolve the case.

There are two types of case closure reasons:

- A predefined reason (as established on the Reason Code page).

- A free-form text reason.

Note: Use the Reason and Solution Link page to associate solutions with each of the predefined reasons. If the user selects a reason that does not have an associated solution, the system creates and uses a new solution type: *Canned*. The reason code description becomes the solution summary. If the user enters a free-form text reason, the system creates and uses a new solution type: *Adhoc*. The text that the user enters becomes the solution summary. Users can enter multiple solutions to solve cases.

Related Links

[Understanding Processing a Case](#)

[Associating Solutions with Reasons for Closing Cases](#)

[Understanding Call Center Prompt Tables](#)

“Understanding Solution Management Setup” (PeopleSoft Services Foundation)

“Understanding Solutions” (PeopleSoft Services Foundation)

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

Search Descriptions for Predefined Searches

Self-service application users have access to predefined searches that locate cases that are associated with the user.

Case Accessibility

Self-service application cases can be accessed by:

- Company representatives (contacts).

In PeopleSoft Support cases are created mainly for companies. This is anyone who acts as a contact for the company, regardless of whether that person is associated with the case in question. You can also allow the creation of cases for consumers. When cases are created for consumers, the contact can be a consumer or another person.

Note that in PeopleSoft Service Center for Higher Education, cases can be created by constituents (who have the role of individual consumers).

- Employees.

In PeopleSoft HelpDesk and PeopleSoft HelpDesk for Human Resources cases are typically created by employees. In PeopleSoft HelpDesk there can be an alternate contact. Employees acting on their own behalf are *not* considered alternate contacts.

In PeopleSoft Service Center for Higher Education, cases can be created by employees: this is typically done by staff or faculty who need to create a case.

- Managers

In PeopleSoft HelpDesk for Human Resources managers can report cases on behalf of the people reporting directly to them. This functionality requires an interface to a human resource management system. In PeopleSoft HelpDesk managers can report a case on behalf of another worker, provided the worker has been properly entered into the PeopleSoft CRM system.

A person who is a contact for more than one customer (for example, a consultant who works with several of your customers) uses the Customer Selection pagelet in the PeopleSoft Customer Portal to indicate which company's information to access.

Case Searching

Self-service application users can search for existing cases in two ways:

- Basic search.

The user selects a search from a list of predefined searches.

- Advanced search.

The user can enter search words, including field-specific search criteria.

There are two categories of predefined searches (searches in both categories search across business units).

- *All cases*: This search locates all of the cases that the user can access:
 - In PeopleSoft Support, company contacts can view all of the company's cases, including cases for which they are not the contact.
 - In PeopleSoft Support, consumers can view all of the cases that are reported on their behalf (regardless of the contact) and all of the cases for which they are contacts (regardless of the customer).
 - In PeopleSoft HelpDesk, employees can view all of the cases that were reported on their behalf (regardless of the contact) and all of the cases for which they are alternate contacts, even if the case was reported for someone else. The delivered name for this search is *all my cases*.
 - In PeopleSoft Service Center for Higher Education, consumers, company contacts and employees will be able to view their cases and any cases for which they are a contact.
- *Cases for which I am the contact*: This search locates cases where the self-service application user is the contact, regardless of the person or company for whom the case was created.
 - In PeopleSoft Support, a person representing a company can view cases for the company that is being represented. They do, however, have to be the contact for the case to be able to view the case.
 - In PeopleSoft Support, consumers can view cases for which they are the contact. Unless another person is identified as the case contact, consumers are considered their own contacts.
 - In PeopleSoft HelpDesk, employees can view cases for which they are the alternate contact. This search does not retrieve cases for which the user is the employee and there is no alternate contact, even though the absence of an alternate employee implies that the employee is the case contact.

These predefined searches are based on the *All cases* and *Cases for which I am the contact*. search types:

- All cases that I am contact for.
- All my cases.
- All my open cases.

- Cases that I am contact for, last 30 days.
- Cases that I am contact for, last 7 days.
- Cases that I reported for others.
- My cases reported in the last 30 days.
- My cases reported in the last 7 days.
- Open cases that I am contact for.
- Open cases that I reported for others.

When you configure descriptions for the searches, you can set up different descriptions for each delivered role type: *contact*, *consumer*, *broker*, and *employee*.

Note: If you add additional role types that apply to self-service application users, you must set up corresponding predefined searches. The system does not do this for you.

Related Links

“Defining Role Types and Role Categories” (Business Object Management)

Troubleshooting Guide and FAQ Configuration

PeopleSoft Support and HelpDesk self-service application users have direct access to solutions and troubleshooting guides.

Note: Troubleshooting guides and FAQs are used in PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources.

Troubleshooting Guides

To make a troubleshooting guide script available to self-service application users, associate it with a solution library. You can associate solution libraries with one script only, so you must create a library for each script. When self-service application users select a script, they see the library name, not the script name.

Frequently Asked Questions (FAQs)

The Frequently Asked Questions self-service page gives PeopleSoft Support self-service customers access to solutions whose corresponding library has the **External FAQ** check box selected.

Related Links

[Accessing FAQs](#)

“Defining Role Types and Role Categories” (Business Object Management)

[Selecting and Running Troubleshooting Guides](#)

“Understanding Solution Management Setup” (PeopleSoft Services Foundation)

“Understanding Solutions” (PeopleSoft Services Foundation)

Configuring Contact Me Regarding This Problem Notifications

This topic discusses how to configure notifications that are triggered after users click the **Contact Me Regarding This Problem** button on self-service application pages.

Note: The **Contact Me Regarding This Problem** button is specific to call center self-service application pages; it is different from the Contact Us page that customers use to submit general-purpose questions and feedback to your organization.

To configure notifications for the **Contact Me Regarding This Problem** button:

1. Create a new email template (if you do not want to use the delivered email template for your email notifications).
2. Set up an AAF policy to configure the use of the **Contact Me Regarding This Problem** button.

Use these AAF delivered data elements:

<i>Data Element</i>	<i>Name</i>
Trigger Point	After a New Self-Service HelpDesk Case is Saved After a New Self-Service Support Case is Saved
Policy Name	Employee Has Requested Contact - Agent Assigned Employee Has Requested Contact - Provider Group Assigned Employee Has Requested Contact - No Provider Group or Agent Assigned Self Service Case Created - Assigned to Agent Self Service Case Created - Assigned To Provider Group Note: These are the policies that PeopleSoft delivers. You can create new policies as you need them.
Action Type	Notifications & Workflow
Action Name	Worklist Notification to Assigned To Send Worklist Notification

Related Links

“Understanding AAF” (Automation and Configuration Tools)

“Sending Contact Us Messages” (Application Fundamentals)

Associating Solutions with Reasons for Closing Cases

This topic discusses how to associate solutions with reasons for closing cases.

Page Used to Associate Solutions with Reasons for Closing Cases

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Reason and Solution Link Page</u>	RC_REASON_SOLN	Identify the solutions that users can select from to close cases through self-service applications.

Reason and Solution Link Page

Use the Reason and Solution Link page (RC_REASON_SOLN) to identify the solutions that users can select from to close cases through self-service applications.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Reason and Solution Link

This example illustrates the fields and controls on the Reason and Solution Link page.

Reason and Solution Link

SetID COM01 **Description** Communications

Reason and Solution Link			Personalize Find  	1-3 of 3
Reason Code	Description	Solution ID	Solution Summary	
CASECANCLD	Case Canceled	301342 	Case Canceled by Customer in Self-Service	
CASECLOSED	Case Resolved	301329 	Case Resolved in Self-Service	
DUPLICATE	Duplicate Case	301307 	Case Closed by Customer in Self-Service because is a Duplicate	

<i>Field or Control</i>	<i>Description</i>
Reason Code	Displays all the reasons of the type <i>Reason Closed</i> that you have set up for this setID. These are the reasons that a self-service application user can select from when closing a case.

Field or Control	Description
Solution ID	Select the solution that represents the reason a user may close a case. When a self-service application user closes a case and selects a reason, the associated solution is added to the case as a resolution with this status: <i>Successful Resolution</i>. If a reason does not have an associated solution, then the first time that a self-service application user closes a case with that reason, the system creates a <i>Canned</i> solution and associates it with that reason. The next time that reason is used, the solution that was previously created is used.

Updating Search Descriptions

To update search descriptions, use the Predefined Search Attributes (RG_DEFINED_SRCH) component.

This topic discusses how to update predefined search descriptions.

Page Used to Update Search Descriptions

Page Name	Definition Name	Usage
<u>Predefined Search Attributes Page</u>	RC_DEFINED_SRCH	Update predefined search descriptions.

Predefined Search Attributes Page

Use the Predefined Search Attributes page (RC_DEFINED_SRCH) to update predefined search descriptions.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Predefined Search Criteria

This example illustrates the fields and controls on the Predefined Search Attributes page.

Predefined Search Attributes

New Window | Help | Personalize Page

Pre-defined Search ID

HHD_SS

*Description

HR Helpdesk Self Service

Search Attributes

1-13 of 13

Enabled	Default	Search Code	Role Type	Description
☒	☐	COALL	Worker	All my cases
☐	☐	COL30	Worker	My cases reported in the last 30 days
☐	☐	COL7D	Worker	My cases reported in the last 7 days
☒	☐	COOPN	Worker	All my open cases
☒	☐	KIALL	Worker	All Known Issues that I am interested in

For each search code and customer role type combination, review the search description and modify it as needed. You can also enable a search code or disable it by either clearing or selecting the associated check box. Select one of the search codes as the default, if desired.

Configuring Troubleshooting Guide

To configure troubleshooting guides, use the Troubleshooting Guide (RBT_TGUIDE_SETUP) and Solution Library Setup (RC_SOLN_LIB_SETUP) components.

This topic discusses how to configure troubleshooting guides.

Pages Used to Configure Troubleshooting Guides

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Troubleshooting Guide Page</u>	RBT_TGUIDE_SETUP	Identify troubleshooting guide scripts that customers can access through self-service applications.
<u>Solution - Libraries Page</u>	RC_SOLN_LIBRARY	Create solution libraries.

Troubleshooting Guide Page

Use the Troubleshooting Guide page (RBT_TGUIDE_SETUP) to identify troubleshooting guide scripts that customers can access through self-service applications.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Troubleshooting Guide Setup > Troubleshooting Guide

This example illustrates the fields and controls on the Troubleshooting Guide page.

Troubleshooting Guide

SetID IPROD

Solution Library CAPP

*Script ID 11000027

*Description Commercial Appliance Troubleshooting

Modified 06/01/2012 12:31PM PDT VP1

Library Name Commercial Appliances

Script Name Commercial Appliance Troubleshooting-SS

218 characters remaining

* Required Field

Field or Control	Description
Script ID	Select the script to run when the self-service application user selects the solution library. Because each library is associated with a single script, you must create additional libraries for each script that you want to make available to self-service application users on the Customer Care - Troubleshooting Guide page.

Solution - Libraries Page

Use the Solution - Libraries page (RC_SOLN_LIBRARY) to create solution libraries.

Navigation:

Solutions > Search Solutions > Libraries

This example illustrates the fields and controls on the Solution - Libraries page.

Solution

Save

Solution ID 37

Summary Basic causes for Computer System lock-ups, hangs o...

Total Viewed Count 1

Total Solved Count 0

Solution

Notes

Libraries

Related Actions

History

Solution Libraries

Personalize | Find | First 1 of 1 Last

*Library

Library Name

Internal FAQ

External FAQ

CRM2

CRM2

☒

☒

Add Library

Select the External FAQ check box to make the solution available to self-service users as a Frequently Asked Question.

Solution libraries are set up in a similar manner across many PeopleSoft CRM applications.

Related Links

“Solution Library Page” (PeopleSoft Services Foundation)

Working with Self-Service Application Transactions

Understanding Self-Service Transactions

PeopleSoft CRM call center applications enable you to deploy self-service transactions that callers can use to enter and view their own cases. These transactions provide limited access to case information and employ a simple interface that is suited to the casual, untrained user.

This topic discusses:

- Self-service transactions.
- Configurable functionality.
- Self-service data access.
- Case visibility.
- Confirmation pages.

Related Links

“Understanding Customer Self-Service” (Application Fundamentals)

Self-Service Transactions

The following transactions are available to PeopleSoft Support, PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, and PeopleSoft HelpDesk for Higher Education self-service users:

- Search for solutions outside the context of a case.
- Create a new case (Create Case).
- Manage cases.

Search for, review, and update existing cases.

- Use FAQs.

Access solutions that belong to the solution library with a specific FAQ configuration.

- Use troubleshooting guides.

Access and run troubleshooting guide scripts that have been associated with solution libraries.

Note: For information on using employee self service to add and manage change requests, refer to the documentation on Using Change Management.

Related Links

[Managing Basic Change Request Information](#)

Configurable Functionality

Within the transactions that are used to create and manage cases, certain functionality depends on the system configuration.

Business Unit Configuration

The availability of the following functionality depends on the settings on the Business Unit - Options page:

- Close a case.

The **Close this case** link is available for cases that have not been resolved and have no corresponding resolution with the status *Successful Resolution*. The button's availability depends not on the case status, but on the resolution status.

When a self-service user clicks this button and provides a reason for closing the case, the system adds a successful resolution to the case and updates the status based on the closed case status that you select on the Case Defaults page. (If you do not enter a closed case status or if you enter a status with a type other than *Closed*, then the case is not closed. It is resolved, however.)

- Reopen a case.

The **Re-open this case** link is available for cases that have been resolved—that is, there is a resolution with the status *Successful Resolution*. The button's availability depends not on the case status, but on the resolution status.

When a self-service user clicks the **Re-open this case** button and provides a reason for reopening the case, the system changes the status of the successful resolution to *Resolution Failed* and updates the status based on the reopened case status that you select on the Case Defaults page. (If you do not enter a reopened case status, the status does not change.)

If your organization has not set a reopened case status, the status doesn't change. This could result in cases having a closed status without having a successful resolution—a condition that the system normally does not allow.

Users can reopen cases only during the grace period that is established by your organization. The grace period lasts for a specified number of days after a user has resolved the case.

Active Analytics Framework (AAF) Notifications

The AAF decision engine handles notifications related to activity that is in the self-service pages. PeopleSoft delivers AAF action types that:

- Send a notification when a new case is submitted.

- Send a notification when a user clicks the **Contact Me regarding this case** button.

The system sends both notifications to the agent, call center manager, or provider group who is assigned to the new case.

Note: All AAF policies are delivered inactive. Users must activate the AAF objects that they wish to use.

Self-Service Workflow

PeopleSoft has built these action types and workflow actions into its self-service applications for PeopleSoft HelpDesk, HR HelpDesk, Support, and Service Center for Higher Education:

- When a self-service user saves any change to the case, the system sends an email notification to the person to whom a case is assigned.
- When a self-service user creates a new case, the system sends a worklist notification to the default self-service provider group that is associated with the business unit.
- When a user clicks the **Contact Me Regarding This Problem** button for a case that is assigned to an agent:
 - The system sends an email to the assigned agent of the case if their notification preference is email or both.
 - The system sends the case to the assigned case agent's list if their notification preference is worklist or both.
- When a user clicks the **Contact Me Regarding This Problem** button for a case that is assigned to a provider group (but not to an agent), the system sends a worklist entry to the provider group members.
- When a user clicks the **Contact Me Regarding This Problem** button for a case that is unassigned, the system sends a worklist entry to members of the Contact Me provider group (established on the Case Defaults page).

Field Value Configuration

When you set up prompt tables for certain case fields, you can enter self-service versions of the field values.

Related Links

[Understanding Self-Service Transactions](#)

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

[Understanding Call Center Prompt Tables](#)

“Understanding AAF” (Automation and Configuration Tools)

Self-Service Data Access

The fields and data that appear in the self-service transactions vary depending on the configuration and on the data itself.

Field Visibility

Implementers can control the visibility of fields and the appearance of field labels by modifying the display template.

See [Understanding Self-Service Transactions](#).

Row-Level Visibility

Individual case notes and case history items have a visibility attribute that controls self-service access to the data. The **Case Notes** and **Case History** grids on the Manage Case page show only rows of data with *All* visibility. Notes, attachments, and history items with internal visibility do not appear.

Access to solutions is more complex, depending on two factors:

- Solution visibility

When accessing solutions using Solution Advisor or the Frequently Asked Questions page, only solutions with *All* visibility are visible.

- Resolution status

When viewing a case, self-service users can see associated solutions that have a status other than *Withdrawn*. Solutions that are associated with a case appear regardless of the solution's visibility setting.

- Case visibility

When searching cases in Case Search, only the cases with *All* visibility are visible.

Values That Are Available for Selection

When creating a case, self-service users have access to all fields that are available for entry. For some prompt fields (case type, priority, severity, category, specialty type, and detail), self-service users might not have access to all of the values that are valid for agents. This restriction is based on how the value was defined on its setup page. Only values that are tagged for self-service use are available. Furthermore, the field labels for self-service users may differ from those seen by agents (depending on prompt table setup).

Related Links

[Understanding Self-Service Transactions](#)

[Understanding Call Center Prompt Tables](#)

“Understanding Notes and Attachments” (Application Fundamentals)

“Understanding AAF” (Automation and Configuration Tools)

Case Visibility

To prevent employees from viewing sensitive case information (for example, grievances) through the HelpDesk self-service applications, PeopleSoft has added a value called *Internal, exclude Case Contact* to the **Visibility** drop-down menu list on the agent-facing Case page. When an agent selects *Internal, exclude Case Contact*, the employee who is the subject of the case is unable to view the case through the HelpDesk self-service application.

The person who reported the case (Reported By) can view it in the self service application if the case is not secured. When a case is secured, the Reported By person will no longer have visibility to the case in the self-service application.

Note: This feature is only applicable to CRM HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education.

Related Links

[Case Visibility](#)

Confirmation Pages

When self-service users perform certain actions, the system provides a confirmation to assure the user that the transaction was successful.

The confirmation pages have different forms depending on the application.

- PeopleSoft Support displays confirmation text at the top of the page where the user performs the action. The confirmation message is highlighted with a yellow background.
- PeopleSoft HelpDesk and PeopleSoft Service Center for Higher Education use a separate confirmation page, where the user must click a button or link before continuing.

Note: You can control the appearance of configuration pages by modifying display templates.

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

The following actions trigger confirmation messages:

<i>User Action</i>	<i>PeopleSoft HelpDesk Confirmation Page</i>	<i>Description</i>
Submit a new case without searching for solutions (click the Submit button, not the Submit and Search Solutions button).	Submit Confirmation page (RC_CASE_HD_SS_CONF)	Confirms that the user submitted the case. Gives the user the new case number.
Close a case.	Submit Confirmation page (RC_CASE_HD_SS_CLOS)	Confirms that the case is successfully closed.
Reopen a case.	Submit Confirmation page (RC_CASE_HD_SS_SUBT)	Confirms that the case is successfully reopened.
Answer <i>Yes</i> when asked whether a solution resolved the user's problem (when viewing a solution in the context of a case).	Close Case page (RC_CASE_HD_SS_CLOS)	Confirms that the solution is successful and the case is closed.

Understanding the Self-Service Home Page Content and Layout

The self-service home page is a central place where all self-service actions such as finding information, creating cases, and chatting with an agent can be initiated and shortcuts to HR transactions are available. Users can access information or resources they need in order to get their issues resolved. PeopleSoft CRM delivers four versions of home pages:

- HR Service Center: HR Help Desk for employees to manage HR questions and inquiries.
- IT Service Center: IT Help Desk for employees to manage IT questions and inquiries.
- Customer Service Center: Support for customers.
- Campus Service Center: Higher Education for students and faculty.

Various controls and information are displayed on the home page in the form of pagelets. The home pages have different combinations of the following pagelets:

- Welcome Banner
- Quick Links
- Search Here for Answers
- Top Solutions
- FAQ
- Known Issues
- Discussion Forums
- My Recent Cases
- Shortcuts

The Welcome Banner and Search Here for Answers pagelet are fixed in their positions. The self-service user can move other pagelets around by dragging and dropping them to a new position. The following table lists the different pagelets and their description, properties, and the home page they appear in.

<i>Pagelet</i>	<i>Home Page in Which the Pagelet Appears</i>	<i>Description</i>
Welcome Banner	All	Greets the logged in self-service user.
Quick Links	All	Displays links for users to navigate to other components such as Create Case, Manage Cases, Chat, and Email.
Search	All	Allows the user to search for content using the keyword search or browsing through content.

Pagelet	Home Page in Which the Pagelet Appears	Description
Top Solutions	All	Displays a pre-defined list of top solutions.
FAQ	Customer Service Center, HR Service Center, and IT Service Center	Displays a pre-defined list of Frequently Asked Questions.
Known Issues	All	Displays a pre-defined list of Global Cases.
Discussion Forums	Campus Service Center	Displays a list of discussion forums from Enterprise Portal.
My Recent Cases	All	Displays a list of recent cases for the logged in user.
Shortcuts	HR Service Center and Campus Service Center	Displays a list of shortcuts to HCM, EBS, or Campus Solutions that have been defined by the Administrator.

All pagelets except the Welcome Banner has icons in the top-right corner. The following table describes the icons on the pagelets.

Icons	Description
	Refreshes the contents of the pagelet
	Displays options to minimize or expand and remove pagelet.

Accessing Self-Service Transactions In PeopleSoft CRM and HCM

This topic provides overviews on self-service case search, case creation, and case management as they relate to display template families, and discusses how to access self-service transactions.

Understanding Self-Service Case Search and Display Template Families

The system passes the display template family from the content reference (CREF). This enables the system to search for cases across the display template family for cases using the self-service search case component (RC_CASE_SW_SS_SRCH or RC_CASE_HD_SS_SRCH).

CREF Name	Vertical	Display Template Family
CR_RC_CASE_SW_SS_SRCH_GBL	Support	RC_SUPPORT
CR_RC_CASE_HD_SS_SRCH	IT Help Desk	RC_HELPDESK
CR_RC_CASE_HD_SS_SRCH_HHD	HR Help Desk	CRM_HHD
CR_RC_CASE_HD_SS_SRCH_HE	Service Center for Higher Education	CRM_HE

The searching logic uses the display template family instead of the display template ID to filter the cases that are shown in the results grid. Based on the defaulting logic described in previous topics on display template families, the system defaults the display template family, business unit, and display template ID in the self-service search results grid which is displayed when the user searches for a case using the **Find Cases** link on the Quick Links pagelet. You cannot, however, define AAF actions for this component. For the Create Case and Manage Case components you can, however, use AAF to render the Case page with a selected display template.

Case Creation and Display Template Families

The system passes the display template family from the content reference (CREF) to create cases for the create case component (RC_CASE_SS).

The system renders the Create Case pages for the different verticals based on the defaulting logic described in previous topics, which relies on system defaults for the display template family, business unit and display template ID.

PeopleSoft delivers four AAF trigger points that you can use to render the Create Case page using different display template IDs:

- When a New IT Service Center Case is presented.
- When a New HR Service Center Case is presented
- When a New IT Service Center Case Business Unit is changed.
- When a New IT Service Center Case Business Unit is changed.

Based on the AAF policies that you create, the system derives the display template ID when the Case Post Build Event executes. This is used to render the Create Case page. With this design, the system does not store the display template ID in the case record. Instead, the system stores the display template family code in the case record.

Case Management and Display Template Families

The system passes the display template Family from the *CRMRefTransfer* application programming interface (API) to display the Manage Case page (RC_CASE_SW_SS).

The system renders the Manage Case pages for the different verticals based on the defaulting logic described in previous topics, which relies on system defaults for the display template family, business unit and display template ID.

PeopleSoft delivers two AAF trigger points for this component that you can use to render the Case <ID> page using different display template IDs:

- When a IT Service Center Manage Case is presented.
- When a HR Service Center Desk Manage Case is presented.

After the system creates a case, you cannot change the display template family code.

Pages Used to Access Self-Service Transactions

Page Name	Definition Name	Usage
<u>Customer Service Center Home Page</u>	(not applicable)	Select a PeopleSoft (Support) self-service application transaction.
<u>IT Service Center Home Page</u>	(not applicable)	Select a PeopleSoft Help Desk self-service application transaction.
<u>HR Service Center Home Page</u>	(not applicable)	Select a PeopleSoft HR Help Desk self-service application transaction.
<u>HCM Employee Self Service Home Page</u>	(not applicable)	Select an employee self-service application transaction in PeopleSoft HCM.
<u>HCM Manager Self-Service Home Page</u>	(not applicable)	Select a manager self-service application transaction in PeopleSoft HCM.
<u>Campus Service Center Home Page</u>	(not applicable)	Select a PeopleSoft Service Center for Higher Education self-service application transaction.
<u>Student Center Home Page</u>	(not applicable)	Select a self-service application transaction in PeopleSoft Student Center (Campus Service Center).
<u>Faculty Center Home Page</u>	(not applicable)	Select a self-service application transaction in PeopleSoft Faculty Center (Campus Service Center).
<u>Customer Selection Page</u>	CUST_SELECT	Select a customer to represent in PeopleSoft Customer Service Center or Campus Service Center self-service application transactions.

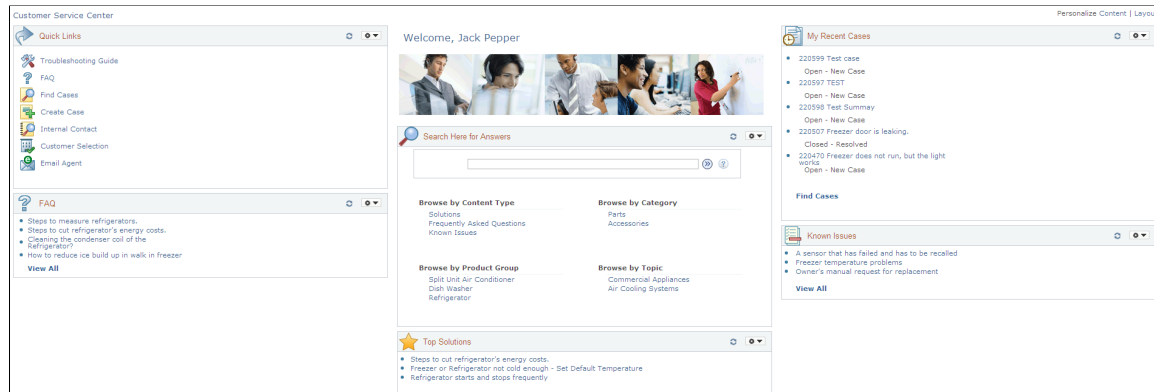
Customer Service Center Home Page

Use the Customer Service Center home page to select a PeopleSoft Support self-service application transaction.

Navigation:

- **Customer Service Center**
- **Customer Care > Customer Service Center**

This example illustrates the fields and controls on the Customer Service Center home page.



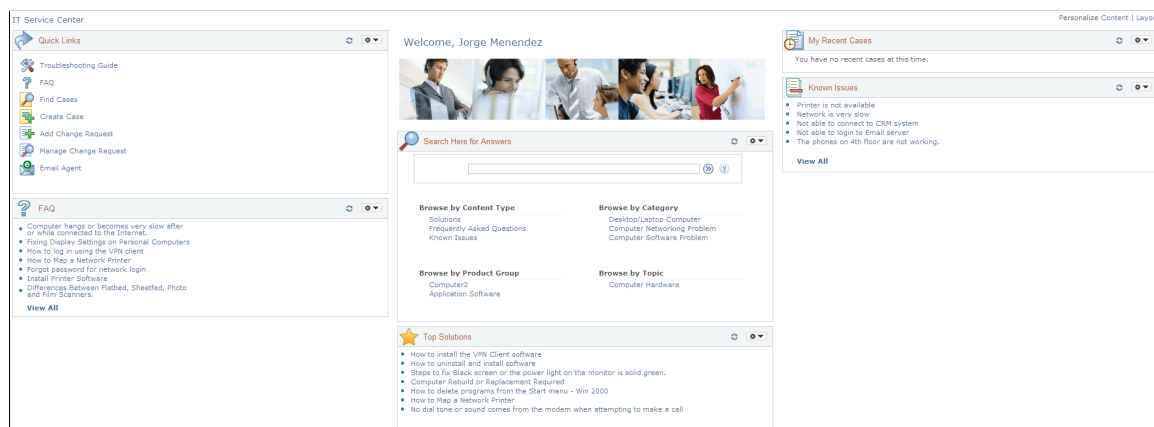
IT Service Center Home Page

Use the IT Service Center home page to select a PeopleSoft Help Desk self-service application transaction.

Navigation:

- **IT Service Center**
- **Employee Self Service > Help Desk > IT Service Center**

This example illustrates the fields and controls on the IT Service Center home page.



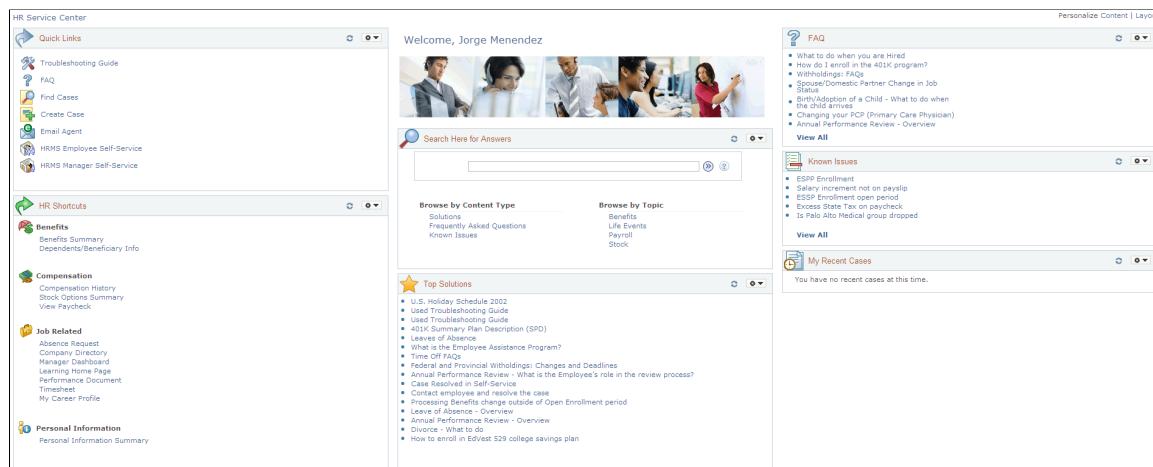
HR Service Center Home Page

Use the HR Service Center home page to select a PeopleSoft HR Help Desk self-service application transaction.

Navigation:

- **HR Service Center**
- **Employee Self Service > HR Help Desk > HR Service Center**

This example illustrates the fields and controls on the HR Service Center home page.



Note: The HR Service Center home page has been replaced with tiles on the HR Service Center in Fluid. For more information, see [HR Service Center Dashboard](#).

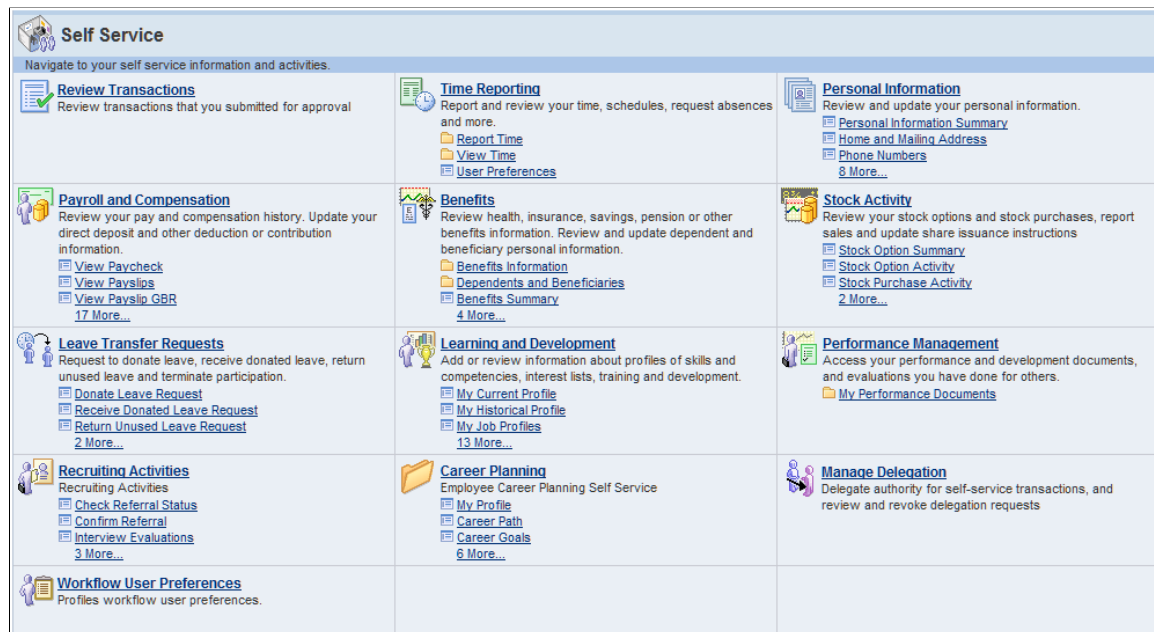
HCM Employee Self Service Home Page

Use the HCM Employee Self Service Home Page to select an employee self-service application transaction in PeopleSoft HCM.

Navigation:

- Click the **HCM Manager Self-Service** link in the Quick Links section on the HR Service Center home page.
- **Employee Self Service > HR Help Desk > HCM Manager Self-Service**

This example illustrates the fields and controls on the HCM Employee Self-Service Home page (PeopleSoft HCM).



HCM Manager Self-Service Home Page

Use the HCM Manager Self-Service home page to select a manager self-service application transaction in PeopleSoft HCM.

Navigation:

- Click the **HCM Employee Self-Service** link in the Quick Links section on the HR Service Center home page.
- **Employee Self Service > HR Help Desk > HCM Employee Self-Service**

This example illustrates the fields and controls on the Manager Self-Service home page (PeopleSoft HCM).



Click the links on these pages to access self-service transactions in PeopleSoft HCM.

Note: PeopleSoft delivers URL identifiers for both the Manager Self-Service page and the Employee Self-Service page in PeopleSoft HCM. To provide access to these pages from PeopleSoft CRM you must update the URLs with the correct server names for your PeopleSoft HCM application. Go to **PeopleTools > Utilities > Administration > URLs > URL Maintenance**. Then select the RC_HD_HRHOME URL identifier and enter the correct URL for the page. Repeat the same process for the RC_HD_HRHOME_MGR URL identifier.

See *PeopleTools: System and Server Administration*.

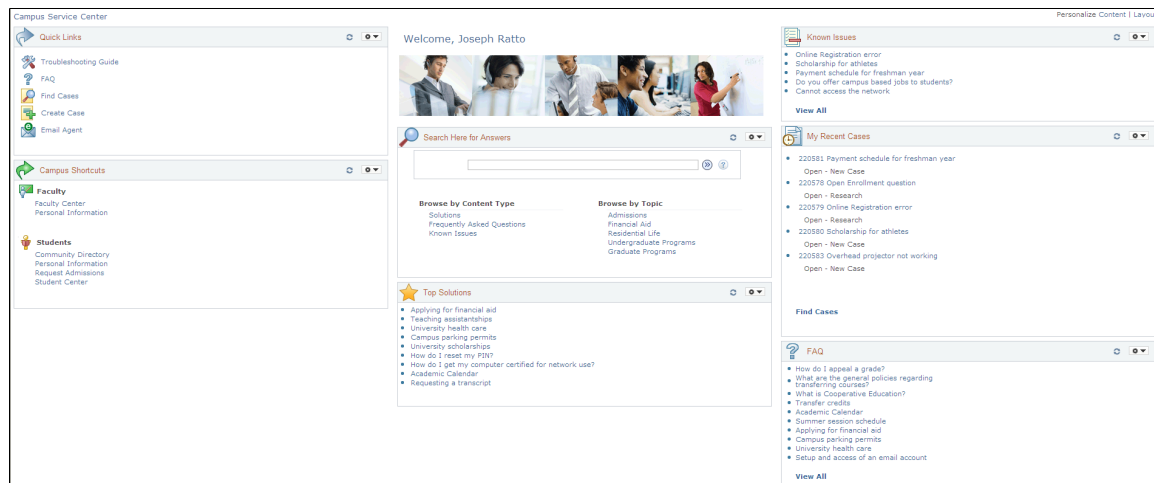
Campus Service Center Home Page

Use the Campus Service Center home page to select a PeopleSoft Service Center for Higher Education self-service application transaction.

Navigation:

- **Campus Service Center**
- **Service Center > Campus Service Center**

This example illustrates the fields and controls on the Campus Service Center home page.



Student Center Home Page

Navigation:

- Click the **Student Center** link in the Campus Shortcuts section on the Campus Service Center home page.
- **Service Center > Student Center**

This example illustrates the fields and controls on the Student Center page (1 of 2) [PeopleSoft Campus Solutions].

Melissa Richards ID: ADCRM1002

student center | general info | admissions | transfer credit | academics | finances | financial aid

Melissa's Student Center

Academics

My Class Schedule | Shopping Cart | My Planner

other academic... >>

Deadlines | URL | Gradebook

2009 Fall Schedule

	Class	Schedule
MUSIC 160-1 LEC (1028)		MoWeFr 8:30AM - 9:20AM Room: TBA
PHILO 210-1 LEC (1026)		TuTh 9:00AM - 10:20AM Room: TBA
SOC 100-1 LEC (1022)		MoWeFr 10:00AM - 10:50AM Room: TBA
SOC 103-1 LEC (1032)		TuTh 2:00PM - 3:20PM Room: TBA

weekly schedule >

SEARCH FOR CLASSES

Holds

Do Not Mail details >

To Do List

Financial Statement
Transfer Statement details >

Enrollment Dates

Open Enrollment Dates

This example illustrates the fields and controls on the Student Center page (2 of 2) [PeopleSoft Campus Solutions].

Finances

My Account | Account Inquiry | Financial Aid | View Financial Aid

Account Summary

You owe 750.00.

- Due Now 500.00
- Future Due 250.00

**** You have a past due balance of 500.00. ****

Currency used is US Dollar.

Personal Information

Demographic Data | Emergency Contact

Contact Information

Permanent Address	Billing Address
None	None

Primary Phone	Home E-mail
None	HCMGENUser1@ap6023fems.us.oracle.com

Admissions

Apply for Admission

Incomplete Complete Admitted

My Applications

University	Programs	Term	Status
PeopleSoft University	Graduate Liberal Arts Programs	2010 Fall	Complete

Advisor

Program Advisor
None Assigned

News and Info

CNN
BBC
NBC

Search Engines

Yahoo
Google

Other Links

Amazon

Click the links on this page to access self-service transactions in PeopleSoft Campus Solutions.

Faculty Center Home Page

Navigation:

Click the **Faculty Center** link in the Campus Shortcuts section on the Campus Service Center home page.

This example illustrates the fields and controls on the Faculty Center home page (PeopleSoft Campus Solutions).

Sandy Kim

[faculty center](#)
[class search](#)
[browse catalog](#)
[faculty search](#)
[learning management](#)

Faculty Center

[My Exam Schedule](#)
[View My Advisees](#)
[View Personal Data Summary](#)

2000 Fall | PeopleSoft University
[change term](#)

Select display option:
☒ Show All Classes
☐ Show Enrolled Classes Only

[Class Roster](#)
[Gradebook](#)
[Grade Roster](#)
[Learning Management](#)

My Teaching Schedule > 2000 Fall > PeopleSoft University

Class	Class Title	Enrolled	Days & Times	Room	Class Dates
 ENGLLIT 100-1 (1116)	Surv Brit Lit (Lecture)	14	MoWeFr 11:00AM - 11:50AM	Angel 103	Aug 27, 2000-Dec 15, 2000
 ENGLLIT 102-1 (1117)	Surv Am Lit (Lecture)	37	MoWeFr 1:00PM - 1:50PM	Angel 102	Aug 27, 2000-Dec 15, 2000

[View Weekly Teaching Schedule](#)
[Go to top](#)

My Exam Schedule > 2000 Fall > PeopleSoft University

You have no final exams scheduled at this time.

[Go to top](#)

Faculty Center
[Class Search](#)
[Browse Catalog](#)
[Faculty Search](#)
[Learning Management](#)

Customer Selection Page

Use the Customer Selection page (CUST_SELECT) to select a customer to represent in PeopleSoft Customer Service Center and Campus Service Center self-service application transactions.

Navigation:

Service Center > Customer Selection

This example illustrates the fields and controls on the Customer Selection page.

Customer Selection

You are currently representing MMA Property Management Group.

Select the customer you want to represent.

Customer List	
Cady Montgomery	Select
MMA Property Management Group	Current Selection

Use this page if you have more than one role in Customer Service Center or Campus Service Center. Click the **Select** button to choose the role that you wish to be used when accessing a Service Center for Higher Education self-service case.

If you have multiple roles and you do not access this page to select the desired role to be used for Customer Service Center or Campus Service Center self-service cases, the system will default your role by using the first role found for you in this hierarchy:

- Worker.
- Consumer (Constituent).
- Company Contact.

Defining the Self-Service Home Page Content and Layout

This topic discusses how to define the self-service home page content and layout.

As an Administrator, you can perform the following for each pagelet:

- Position of each pagelet
- Whether the pagelet will be fixed or can be moved around by the end-user
- Whether the end-user can remove the pagelet
- Refresh and Page Setup icons
- Pagelet title

Pages Used to Set Up the Self-Service Home Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Home Page - General Page</u>	RC_SS_GENERAL	Enter an email address to which emails from the home page will be sent.
<u>Home Page - Top Solutions Page</u>	RC_SS_SOLUTION	Search for solutions using search criteria and select solutions to be displayed in the Top Solutions pagelet on the Support Self Service home page across different business units.
<u>Home Page - Fluid Preferences Page</u>	RC_SS_TL_SETUP	Set up the Browse By Topic tile and the order in which the links appear on the Browse By topic tile. Only the first 11 links are displayed on the tile.
<u>Home Page - Search Pagelet Page</u>	RC_SS_FACET	Set up the Search Here for Answers pagelet on the home page by selecting the facets and values under each facet to be displayed.
<u>Home Page - FAQ Page</u>	RC_SS_FAQ	Select the top Frequently Asked Questions to be displayed in the FAQ pagelet on the home page across different Set Ids and Solution Libraries.
<u>Home Page - Known Issues Page</u>	RC_SS_ISSUES	Select the Global Cases to be displayed to a self-service user.
<u>Home Page - Shortcuts Page</u>	RC_SS_LINKS	Set up HCM or Campus Solutions shortcut links to be displayed on the Home page.
<u>Home Page - Quick Links Page</u>	RC_SS_QUICK_LINKS	Set up the quick links to be displayed in the Quick Links pagelet.
<u>Home Page - Chat Schedule Page</u>	RC_SS_AGT_SCHEDULE	Set up Chat Schedule based on agent availability.
<u>Personalize Content: <Service Center Name> Page</u>	PORTAL_HPCOMP	Personalize the name of the home page, Welcome message, and select pagelets to be displayed.
<u>Personalize Layout: <Service Center Name> Page</u>	PORTAL_HPLAYOUT	Personalize the appearance and layout of the home page and delete pagelets.

Home Page - General Page

Use the Home Page - General page (RC_SS_GENERAL) to enter an email address to which emails from the home page will be sent.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > General

This example illustrates the fields and controls on the Home Page - General page.

<i>Field or Control</i>	<i>Description</i>
Email Address	Enter an email address in this field. The email address can be an ERMS mailbox or any other email address.

Home Page - Top Solutions Page

Use the Home Page - Top Solutions page (RC_SS_SOLUTION) to search for solutions using search criteria and select solutions to be displayed in the Top Solutions pagelet on the Support Self Service home page across different business units.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Top Solutions

This example illustrates the fields and controls on the Home Page - Top Solutions page (1 of 2).

Solution to Display on Top Solutions Pagelet

Order	SetID	Set ID Description	Solution Library	Solution ID	Solution Summary	Usage Count	Solved Count	Self Service Usage Count	Self Service Solved Count	Self Service Unsolved Count	Date Last Used
☐	HRSQL	Solutions		301504	What is the Employee Stock Purchase Plan, or ESPP?						
☐	HRSQL	Solutions		301507	How do I enroll in the 401K program?			1			
☐	HRSQL	Solutions		301509	How long is a child considered a dependent for Health Benefits?						
☐	HRSQL	Solutions		301514	Birth/Adoption of a Child - What to do when the child arrives			1			
☐	HRSQL	Solutions		301523	On what day of the month do I receive my paycheck?						
☐	HRSQL	Solutions		301538	Education Assistance Program			1			
☐	HRSQL	Solutions		301563	Birth or Adoption of a Child - What to Do?						
☐	HRSQL	Solutions		301574	New Hire Benefits enrollment Checklist						

Enter or select the criteria you want to appear in the list of Solutions and click Search.

Search

Use Saved Search

*SetID

=

HRU01

Solution Library

=

Solution Summary

contains

Usage Count

=

Solved Count

=

Self Service Usage Count

=

Self Service Solved Count

=

Self Service Unsolved Count

=

Last Usage

=

Time

Search

Clear

Basic Search

Save Search Criteria

Delete Saved Search

Personalize Search

This example illustrates the fields and controls on the Home Page - Top Solutions page (2 of 2).

Search Results

	SetID	Library Name	Solution ID	Solution Summary	Usage Count	Solved Count	Self Service Usage Count	Self Service Solved Count	Self Service Unsolved Count	Last Usage Date/Time
☐	HRU01	Stock	300005	What is the Employee Stock Purchase Plan, or ESPP?						
☐	HRU01	Stock	300020	Trading Window for Company Stock						
☐	HRU01	Stock	300019	Exercising Your Options						
☐	HRU01	Stock	300018	Reporting Stock Sales						

Add to Top Solution

Modified 04/02/2013 11:16AM PDT SAMPLE

Save

Return to Search

Previous in List

Next in List

Notify

Solution to Display on Top Solutions Pagelet Section

Field or Control	Description
Solution Summary	Click the Solution Summary link to drill into solution and open the solution details in a separate window.
	Click the Delete row icon to remove a solution so that it is not displayed on the Top Solutions pagelet on the home page.
Order	Specify the order in which the solutions will be displayed in the Top Solutions pagelet and click the Save button.

Search Section

Search for solutions using one or more of the following search criteria:

- Use Saved Search
- SetID
- Solution Library
- Solution Summary
- Usage Count
- Solved Count
- Self Service Usage Count
- Self Service Solved Count
- Self Service Unsolved Count
- Last Usage

Search Results Section

This section displays solutions based on the search criteria and are filtered by solutions that are not marked as FAQ with Type = Standard, Status = Active, Visibility = All and solutions that are not expired. Only solutions that are not already added to the Top Solutions pagelet are displayed in the search results.

<i>Field or Control</i>	<i>Description</i>
Add to Top Solution	Select one or multiple solutions in the Search results and click the Add to Top Solutions button. Note: It is recommended to keep this list to less than 15 solutions since these represent the top solutions and all top solutions will be displayed in this pagelet.
Solution Summary	Click a Solution Summary link to view the solution details in a separate window.

Home Page - Fluid Preferences Page

Use the Home Page - Fluid Preferences page (RC_SS_TL_SETUP) to set up **Browse By Topic** tile and the order in which the links appear on the Browse By topic tile. Only the first 11 links are displayed on the tile.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Fluid Preferences

This example illustrates the fields and controls on the Home Page - Fluid Preferences page. You can find definitions for the fields and controls later on this page.

Fluid Preferences

Home Page

General

Top Solutions

Fluid Preferences

Search Pagelet

FAQ

Known Issues

Shortcuts

Quick Links

New Window

Personalize Page

Display Template Family Code

CRM_HHD

Description

HR HelpDesk Case Family

Facets

☒ Topic

Topics

1-5 of 5

Order	*SetID	*Topic	
10	HRSOL	Benefits	
20	HRSOL	Life Events	
30	HRSOL	Payroll	
40	HRSOL	Pension	
50	HRSOL	Stock	

Add Topic

Field or Control	Description
Topic check box	Select the check box to enable the Topics grid below.
Topics grid	Select the Solution Libraries to be displayed on the Browse by Topic tile. Specify the order in which the solutions will be displayed on the Browse by Topic tile. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The Topic lookup displays all Solution Libraries for the selected Set ID.
Add Topic button	Use this button to add a topic.

Home Page - Search Pagelet Page

Use the Home Page - Search Pagelet page (RC_SS_FACET) to set up the Search Here for Answers pagelet on the home page by selecting the facets and values under each facet to be displayed.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Search Pagelet

This example illustrates the fields and controls on the Home Page - Search Pagelet page.

Facets on Search Pagelet

☒ Content Type
☐ Category
☒ Topic
☐ Product Group

Content Type

☒ Solutions
☒ Frequently Asked Questions
☒ Known Issues

Categories Personalize | Find | View All | First 1 of 1 Last

*Setid *Category

Add Category

Topics Personalize | Find | View All | First 1-4 of 4 Last

*SetID *Topic

Add Topic

Product Groups Personalize | Find | View All | First 1 of 1 Last

*SetID *Product Group

Add Product Group

Field or Control	Description
Facets on Search Pagelet	Select the facets to be displayed on the Search Here for Answers pagelet.
Content Type	Select the content types to be displayed on the Search Here for Answers pagelet. The different content types include Solutions, Frequently Asked Questions, and Known Issues.
Categories	Select the categories to be displayed under the Category facet on the Search Here for Answers pagelet. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The Category lookup displays all categories that have an active combination under Combine Category Type Detail component for the selected Set Id.

Field or Control	Description
Topics	Select the Solution Libraries to be displayed under the Topic facet on the Search Here for Answers pagelet. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The topic lookup displays all Solution Libraries for the selected Set ID.
Product Groups	Select the Product Groups to be displayed on the Search Here for Answers pagelet. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The Product Group lookup displays the product groups for the selected Set ID.

Home Page - FAQ Page

Use the Home Page - FAQ page (RC_SS_FAQ) to select the Top Frequently Asked Questions to be displayed in the FAQ pagelet on the home page across different Set Ids and Solution Libraries.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > FAQ

This example illustrates the fields and controls on the Home Page - FAQ page (1 of 2).

Display Template Family Code CRM_HHD
Description HR HelpDesk Case Family

Order	SetID	Description	Solution Library	Library FAQ	Solution ID	Visibility	External FAQ	FAQ
☒ 10	HRU01	HRHDUSA	Life Events	☒	300053	All	☒	What to do when you are Hired
☒ 20	HRU01	HRHDUSA	Benefits	☒	300008	All	☒	How do I enroll in the 401K program?
☒ 30	HRU01	HRHDUSA	Payroll	☒	300026	All	☒	Withholdings: FAQs
☒ 40	HRU01	HRHDUSA	Life Events	☒	300089	All	☒	Spouse/Domestic Partner Change in Job Status
☒ 50	HRU01	HRHDUSA	Benefits	☒	300016	All	☒	Birth/Adoption of a Child - What to do when the child arrives
☒ 60	HRU01	HRHDUSA	Benefits	☒	300021	All	☒	Changing your PCP (Primary Care Physician)
☒ 70	HRU01	HRHDUSA	Benefits	☒	301297	All	☒	Annual Performance Review - Overview

Enter or select the criteria you want to appear in the list of FAQs and click Search.

Search

Use Saved Search

*SetID = HRU01

Library =

Search Clear

Save Search Criteria Delete Saved Search Personalize Search

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Save Return to Search Previous in List Next in List Notify

This example illustrates the fields and controls on the Home Page - FAQ page (2 of 2).

SetID = HRU01 AND Library = Stock

Search

Use Saved Search

*SetID =

Library =

Save Search Criteria Delete Saved Search Personalize Search

Solution Library	Solution ID	FAQ	Date Created	Date Modified
☐ Stock	300005	What is the Employee Stock Purchase Plan, or ESPP?	03/23/2009 5:27AM	03/23/2009 5:27AM
☐ Stock	300018	Reporting Stock Sales	03/23/2009 5:27AM	03/23/2009 5:27AM
☐ Stock	300019	Exercising Your Options	03/23/2009 5:27AM	03/23/2009 5:27AM
☐ Stock	300020	Trading Window for Company Stock	03/23/2009 5:27AM	03/23/2009 5:27AM

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Save Return to Search Previous in List Next in List Notify

The page displays the list of FAQ that have been selected to display on the Top FAQ pagelet. The fields and controls in the Home Page - FAQ page are similar to the fields and controls in the Home Page - Top Solutions page. See the [Home Page - Top Solutions Page](#) topic for more information.

Home Page - Known Issues Page

Use the Home Page - Known Issues page (RC_SS_ISSUES) to select the Global Cases to be displayed to a self-service user.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Known Issues

This example illustrates the fields and controls on the Home Page - Known Issues page.

Display Template Family Code CRM_HHD					
Description HR HelpDesk Case Family					
Personalize Find First 1-11 of 11 Last					
Select	Business Unit	Case ID	Summary	Status	Date Created
☒	HRH DU	220557	ESPP Enrollment	Open - Research	07/03/2012
☒	HRH DU	220561	Salary increment not on payslip	Open - New	08/01/2012
☒	HRH DU	220562	ESSP Enrollment open period	Open - Research	08/01/2012
☒	HRH DU	220563	Excess State Tax on paycheck	Open - New	08/01/2012
☒	HRH DU	220564	Is Palo Alto Medical group dropped	Open - New	08/01/2012
☒	HRH DU	220565	How to get a printed Payslip	Open - New	08/01/2012
☒	HRH DU	220566	The Holiday list is missing	Open - Research	08/01/2012
☒	HRH DU	220567	10 year anniversary gift taxable	Open-Pend Employee	08/01/2012
☒	HRH DU	220568	New Job Description not in directory	Open - New	08/01/2012
☒	HRH DU	220569	New Baby	Open - New	08/01/2012

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Save
 Return to Search
 Previous in List
 Next in List
 Notify

The Home Page - Known Issues page displays cases that are Global, Non-secured, with Visibility set to external and Open or On-Hold. It displays cases across all Business Units that are relevant to the Display Template Family. The cases are sorted by Date Created. You can click the Case ID link to view case details in a separate window. Select or deselect the global case to be displayed in the Known Issues pagelet.

Home Page - Shortcuts Page

Use the Home Page - Shortcuts page (RC_SS_LINKS) to set up HCM or Campus Solutions shortcut links to be displayed on the Home page.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Shortcuts

This example illustrates the fields and controls on the Home Page - Shortcuts page.

Link Group

HRMSS

HRMS Self Service

Link Category		Benefits		Category Order
Display in Pagelet	Link Order	Version	Link Name	
☒	1	9.2	Benefits Summary	
☒	2	9.2	Dependents/Beneficiary Info	

Link Category		Compensation		Category Order
Display in Pagelet	Link Order	Version	Link Name	
☒	1	9.2	Compensation History	
☒	2	9.2	Stock Options Summary	
☒	3	9.2	View Paycheck	

Link Category		Job Related		Category Order
Display in Pagelet	Link Order	Version	Link Name	
☒	1	9.2	Absence Request	
☒	2	9.2	Company Directory	
☒	2	9.2	Manager Dashboard	
☒	3	9.2	Learning Home Page	
☒	4	9.2	Performance Document	
☒	6	9.2	Timesheet	
☒	7	9.2	My Career Profile	

Link Category		Personal Information		Category Order
Display in Pagelet	Link Order	Version	Link Name	
☒	1	9.2	Personal Information Summary	

The Administrator can use the Home Page - Shortcuts page to set up the shortcut links to be displayed in the Shortcuts pagelet. These Shortcuts are integration points to HCM, EBS or Campus Solutions. The Administrator can set up any number of links to the commonly used components in HCM, EBS, or Campus Solutions.

The Shortcuts are defined using Link Groups, Link Categories and Link Definitions, which is existing functionality. The administrator can add the Link Definitions to the Shortcuts pagelet. Link Definitions that have been marked as Self Service will be available to be added to the Shortcuts pagelet.

Note: The Administrator can use the Link Group component (RC_LINK_GROUP) [Set Up CRM > Product Related > Call Center > Link Group] to set up a Link Group containing the required Link Categories and corresponding Links to be displayed on the Shortcuts pagelet.

The Administrator can select the Display in Pagelet check box to select the links to be displayed in the Home Page - Shortcuts page. The Administrator can also specify the Link Order and Category Order for the pagelet.

Home Page - Quick Links Page

Use the Home Page - Quick Links page (RC_SS_QUICK_LINKS) to set up the quick links to be displayed in the Quick Links pagelet.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Quick Links

This example illustrates the fields and controls on the Home Page - Quick Links page.

Display Template Family Code CRM_HHD

Description HR HelpDesk Case Family

Link Group QLHHD Quick Links HR HelpDesk

Display in Pagelet	Link Order	Version	Link Name	Link Image	
☐		OTH	Create Case	Create Case Self Service	
☒	1	OTH	Troubleshooting Guide	How To Self Service	
☒	2	OTH	FAQ	FAQ Self Service	
☒	3	OTH	Find Cases	Find Cases Self Service	
☒	4	OTH	Create Case	Create Case Self Service	
☒	5	OTH	Email Agent	Email Agent Self Service	
☒	6	OTH	Chat with Agent	Chat With Agent	
☒	7	OTH	HRMS Employee Self-Service	HRMS Employee Self Service	
☒	8	OTH	HRMS Manager Self-Service	HRMS Manager Self Service	

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The Home Page - Quick Links page allows the Administrator to select Quick Links to be displayed to a self-service user and specify their order of appearance in the pagelet. Quick Links are provided to quickly navigate to some of the most used self-service pages in the application. The Administrator can add the Link Definitions to the Quick Links pagelet. Link Definitions that have been marked as Self Service will be available to be added to the Quick Links pagelet. Administrators can set up the quick links to be displayed in the Quick Links pagelet.

Note: The Quick Links are defined using Link Category Definition page, Link Definition page, and Link Group page.

There are two types of Create Case pages. The Administrators can enable one of the Create Case pages to appear in the home page as business requirements.

Home Page - Chat Schedule Page

Use the Home Page - Chat Schedule page (RC_SS_AGT_SCHEDULE) to set up Chat Schedule.

Navigation:

Set Up CRM > Product Related > Call Center > Self-Service Configuration > Home Page > Chat Schedule

This example illustrates the fields and controls on the Home Page - Chat Schedule page.

Display Template Family Code CRM_HHD
Description HR HelpDesk Case Family

Holiday Schedule

Time Zone PST Pacific Time (US)
Holiday Schedule

Hours of Operation

☒ **Monday**
Hours on Monday
Start Time **End Time**
 8:00AM 5:00PM

☒ **Tuesday**
Hours on Tuesday
Start Time **End Time**
 8:00AM 5:00PM

☒ **Wednesday**
Hours on Wednesday
Start Time **End Time**
 8:00AM 5:00PM

☒ **Thursday**
Hours on Thursday
Start Time **End Time**
 8:00AM 5:00PM

☒ **Friday**
Hours on Friday
Start Time **End Time**
 8:00AM 5:00PM

☐ **Saturday**
Hours on Saturday
Start Time **End Time**

☐ **Sunday**
Hours on Sunday
Start Time **End Time**

Modified 04/02/2013 11:17AM PDT **SAMPLE**

Save Return to Search Previous in List Next in List Notify

The Administrator defines the Hour of Operations for each day of the week during which the Chat agents will be available using the Home Page - Chat Schedule page. The Chat Schedule works based on the Display Template family defined. This helps to maintain different chat schedules for Support and Helpdesk call centers. The Time Zone and Hours of Operations are defaulted from the Calendar Options (**Main Menu > Setup CRM > Install > Installation Options**). The Administrator can select a different Time Zone, if needed. The **Chat with Agent** link is displayed on the Quick Links pagelet when a self-service user logs in during these hours. The Holiday Schedule page (HOLIDAY_SCHED_TBL) [**Set Up CRM > Common Definitions > Calendars and Schedules > Holiday Schedule**] specifies the days during which the Chat will not be available for the user.

An Administrator can configure a Live Chat with Agent section to appear on various pages using the Chat Enabled Page Setup page (RB_CHAT_ADMIN) [**Setup CRM > Product Related > Multichannel Definitions > Chat > Chat Page Setup**]. The Chat Schedule set in the Home Page - Chat Schedule page affects this functionality as well. If the Chat with Agent functionality is enabled for a page (e.g. Contact Us page), then during runtime, the Live Chat with Agent section or **Chat with Agent** button is displayed only when a self-service user logs in during the Hour of Operations set through the Chat Schedule setup. Otherwise, Live Chat with Agent section or **Chat with Agent** button is not displayed.

When the chat functionality is configured, the following pages have the **Chat with Agent** button:

- Troubleshooting Guide page
- FAQ page
- Create Case pages
- Open/Display Case pages
- Search page
- Solution Details page

- Known Issues page
- Change Request page
- Internal Contact page
- Customer Selection page

Personalize Content: <Service Center Name> Page

Use the Personalize Content: <Service Center Name> page (PORTAL_HPCOMP) to personalize the name of the home page, Welcome message, and select pagelets to be displayed.

Navigation:

Click the **Personalize Content** link on the top-right corner of the Self-Service Service Center Home page.

This example illustrates the fields and controls on the Personalize Content: <Service Center Name> page.

Personalized Home Page

Personalize Content: Campus Service Center

Tab Name

Welcome Message

Choose Pagelets: Simply check the items that you want to appear on your homepage.
Remember to click "Save" when done.

Arrange Pagelets: Go to [Personalize Layout](#)

Services	Higher Education
☒ Welcome Banner	☒ Quick Links
☒ Welcome Message	☒ Campus Shortcuts
	☒ Search Here for Answers
	☒ Known Issues
	☒ FAQ
	☒ Top Solutions
	☒ My Recent Cases

[Return to Home](#)

Personalize Layout: <Service Center Name> Page

Use the Personalize Layout: <Service Center Name> page (PORTAL_HPLAYOUT) to personalize the name of the home page, Welcome message, and select pagelets to be displayed.

Navigation:

Click the **Personalize Layout** link on the top-right corner of the Self-Service Service Center Home page.

This example illustrates the fields and controls on the Personalize Layout: <Service Center Name> page.

Personalized Home Page

Personalize Layout: **Campus Service Center**

Tab Name: Campus Service Center

Basic Layout: ☐ 2 columns ☒ 3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: Go to [Personalize Content](#)

= Required - fixed position pagelet
* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Quick Links Campus Shortcuts	Welcome Message Welcome Banner Search Here for Answers Top Solutions	Known Issues My Recent Cases FAQ

Save Return to Home

Notify

Viewing the Self-Service Pagelets

You can personalize the appearance of the pagelets in the self-service home page. You can define the position of the pagelets and select the pagelets that need to be displayed on the home page. This topic illustrates how to personalize the pagelets and also describes the features in the pagelets.

A guest user has limited access to the Support self-service home page. A guest user is applicable only to Support and Higher Education verticals. The guest user can view the following pagelets:

- Search
- Top Solutions
- FAQ
- Discussion Forums
- Quick Links

This topic discusses how to view additional self-service home page content.

Note: Self-Service pagelets have been replaced with tiles on the HR Service Center in Fluid. For more information, see [HR Service Center Dashboard](#).

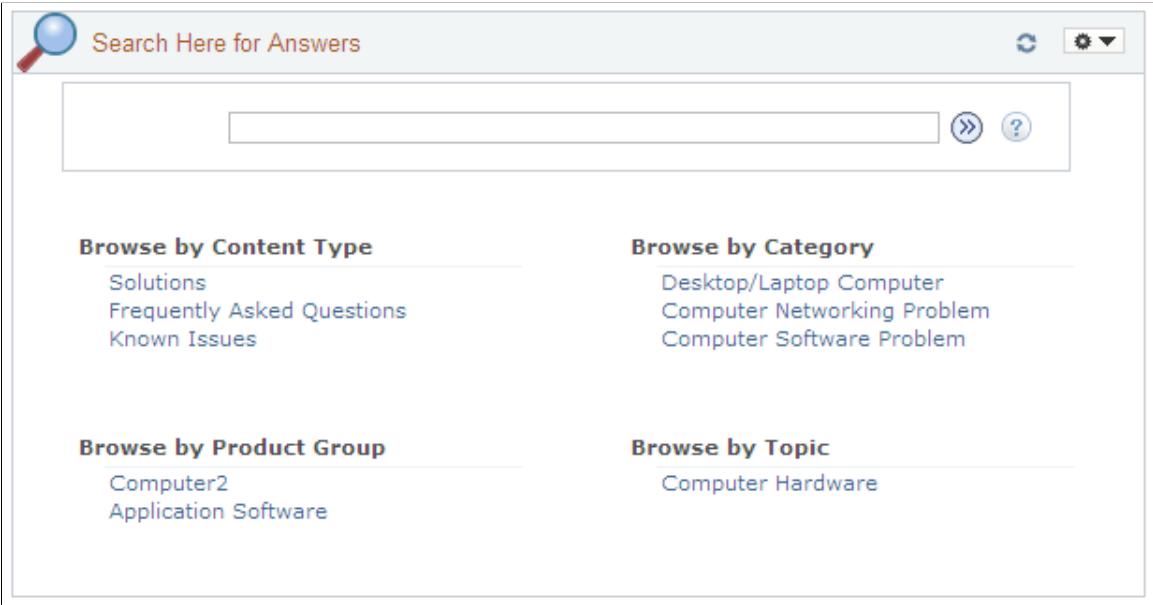
Pages Used to View Additional Self-Service Home Page Content

Page Name	Definition Name	Usage
<u>Search Here for Answers Pagelet</u>	(not applicable)	Search by keyword and browse through content.
<u>Search Page</u>	RC_SS_SOLNSRCH	View content related to the search keyword or category.
<u>Top Solutions Pagelet</u>	(not applicable)	View a list of top solutions selected by the Administrator, if any.
<u>Solution Details Page</u>	RC_SS_SOLNDTLS	View the summary, symptoms, and details of the solution.
<u>FAQ Pagelet</u>	(not applicable)	View a list of the top FAQ selected by the Administrator.
<u>Frequently Asked Question Page</u>	RC_FAQ_DETAILS_SS	View the details of an FAQ.
<u>Known Issues Pagelet</u>	(not applicable)	View global cases. Global cases are cases that impact multiple users and have been marked as Global.
<u>Known Issues Page</u>	RC_KNOWN_ISSUES_SS	View a list of all known issues.
<u>My Recent Cases Pagelet</u>	(not applicable)	View the most recent cases created for the self service user across all Business Units.
<u>Discussion Forums Pagelet</u>	(not applicable)	View and participate in discussions.
<u>Shortcuts Pagelet</u>	(not applicable)	View links to commonly used components in HCM, EBS, or Campus Solutions. A sample set is available for each pillar. The Administrator can configure their own set of shortcuts. Shortcuts are applicable only to HR Service Center and Campus Service Center Home Pages. The Shortcuts pagelet is called the HR Shortcuts pagelet in the HR Service Center and called Campus Shortcuts for Campus Service Center.
<u>Quick Links Pagelet</u>	(not applicable)	View a list of quick links to access various features.

Search Here for Answers Pagelet

Use the Search Here for Answers pagelet to search by keyword and browse through content.

This example illustrates the fields and controls on the Search Here for Answers pagelet.



Field or Control	Description
	Type a keyword in the search field and click the Search icon. Search results are displayed in the Search page. You can further drill down the search results by using one or more facets displayed in the Filter by section displayed to the left of the Search Results.
Facets	Facets categorize available content. You can use the links listed in a facet to browse through content, for e.g. Solutions link under the Browse by Content Type facet. Facets appear based on availability of the content type in the search results.

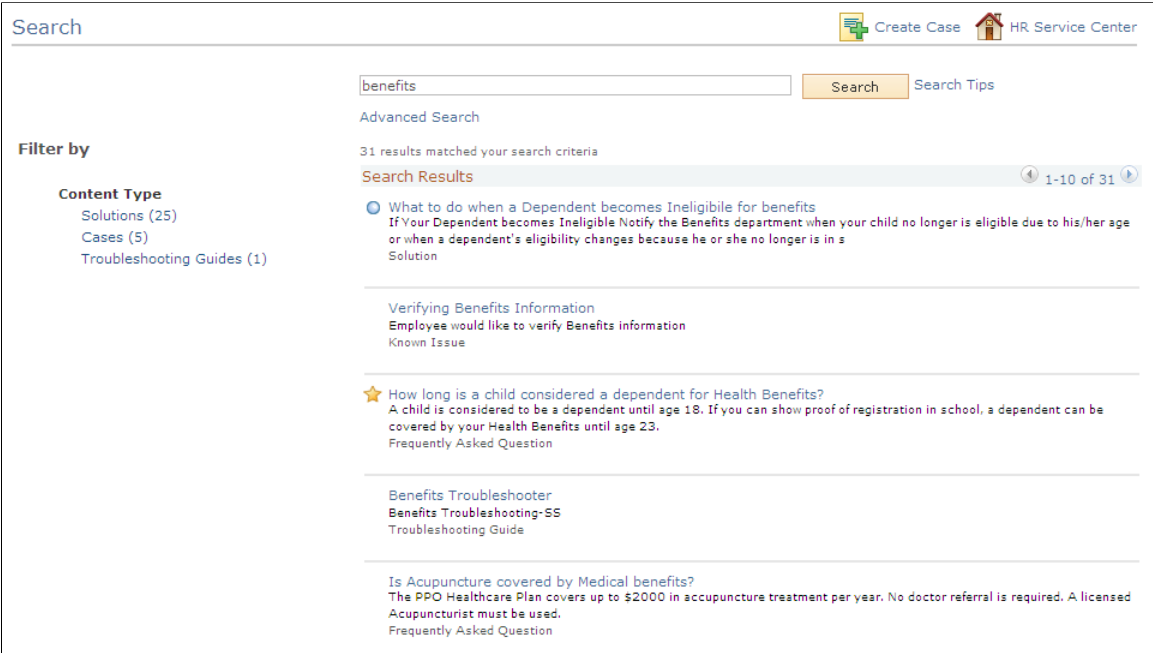
Search Page

Use the Search page (RC_SS_SOLNSRCH) to view content related to the search keyword or category.

Navigation:

- Specify a keyword or leave the search field blank and click the Search icon in the Search Here for Answers pagelet.
- Click a link under a facet in the Search Here for Answers pagelet.

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



When you perform a keyword search or browse by facets the results are displayed in a new page. The results display Solutions, FAQ, Known Issues, and Troubleshooting Guides. You can click the relevant link to view the Solution, FAQ, or Known Issue details. The content type is displayed in the last line. Only content specific to the Display Template Family’s Business Units is displayed in the search results. If the user has BU security set up, only content relevant to the Business Units that the user can access will be displayed in the search results.

For keyword based search, the search results are sorted by score in descending order. The least score for which the results are displayed is defined by the administrator.

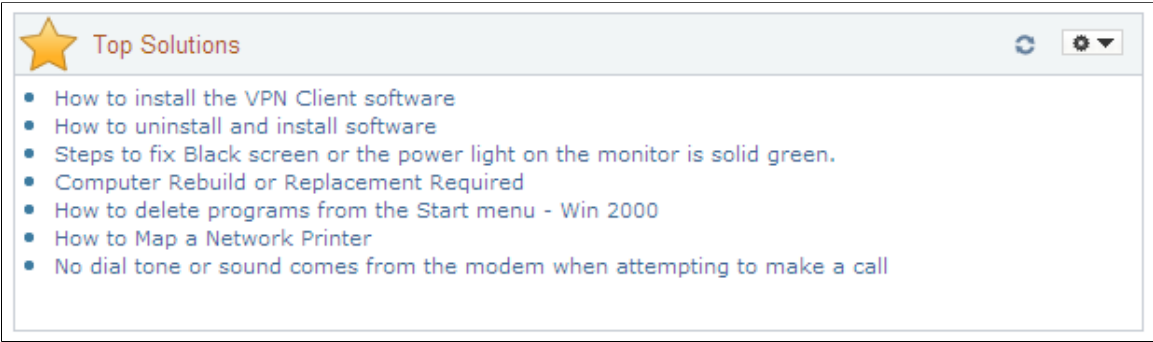
Field or Control	Description
	This is determined by the number of days a solution is considered to be new as defined in the Call Center setup for Business Unit.
	This icon is displayed for any solution that an Administrator has marked as a top solution to be shown in the Top Solutions pagelet on the Home Page.
	A solution is considered to be failed if the user clicks on the No button on the solution for the question “Did this resolve your issue?” If the user performs a new search in the same session (before logging off and logging back in) and it brings up a solution that the user had marked as failed resolution in that session, this icon will still be displayed.

Field or Control	Description
	A solution is considered to be successful if the user clicks on the Yes button on the solution for the question “Did this resolve your issue?” If the user performs a new search in the same session (before logging off and logging back in) and it brings up a solution that the user had marked as a successful resolution in that session, this icon will still be displayed.
	A search result is considered to be viewed if the user drills into a search result. If the user performs a new search in the same session (before logging off and logging back in) and it brings up content that the user had already viewed, this icon will still be displayed. The existing icon for any search result will be changed to Viewed once the result is viewed. The icon for a failed solution will not be changed to Viewed if the user views the solution again.
No icon	A solution that is not new or top or failed or viewed is displayed without any icon. FAQ and Known Issues that are not viewed is displayed without any icon. However, if the user views the failed solution again and submits feedback that the solution worked, the icon will be changed to Successful.
	Bread crumbs with the search criteria are displayed above the search results. You can click the Remove Filter icon to the right of a filter displayed in the bread crumb to remove the filter.
Clear All Filters	Click this link to clear all applied filters from the search results.
Search	You can type a new keyword in the Search field and click the Search button to perform a new search. All applied filters are removed.
<Self-Service> Service Center	Click this link to go back to the home page.
Create Case	If you do not find an appropriate solution, you can click the Create Case link to log a case.
Facets	Use the facets on the left to drill down further into the results.
Advanced Search	Click this link to search for solutions using additional criteria.

Top Solutions Pagelet

Use the Top Solutions pagelet to view a list of top solutions selected by the Administrator, if any.

This example illustrates the fields and controls on the Top Solutions pagelet.

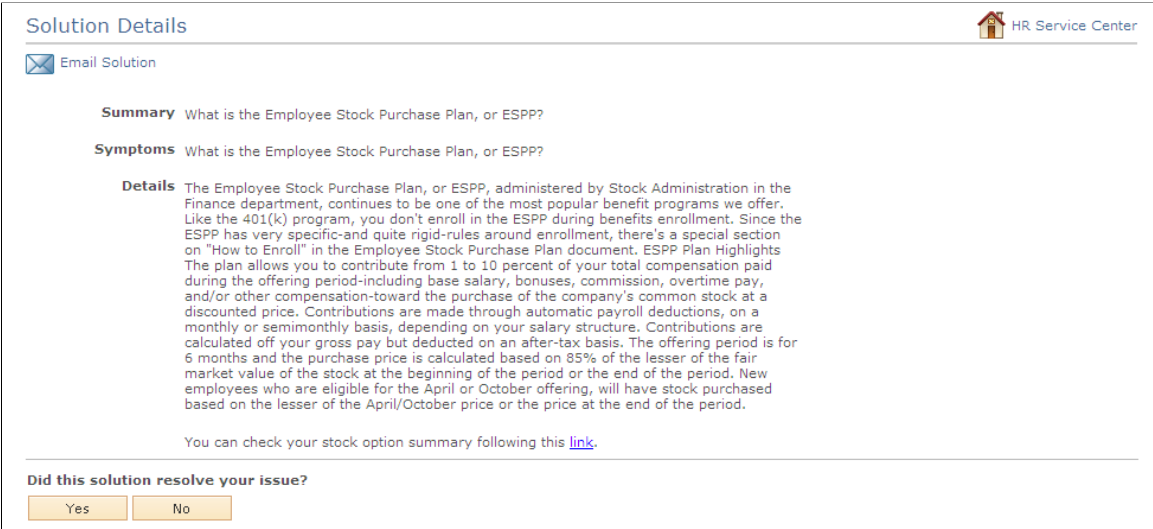


You can click a **Solution** link to view the Solution Details page.

Solution Details Page

Use the Solution Details page (RC_SS_SOLNDTLS) to view the summary, symptoms, and details of the solution.

This example illustrates the fields and controls on the Solution Details page.

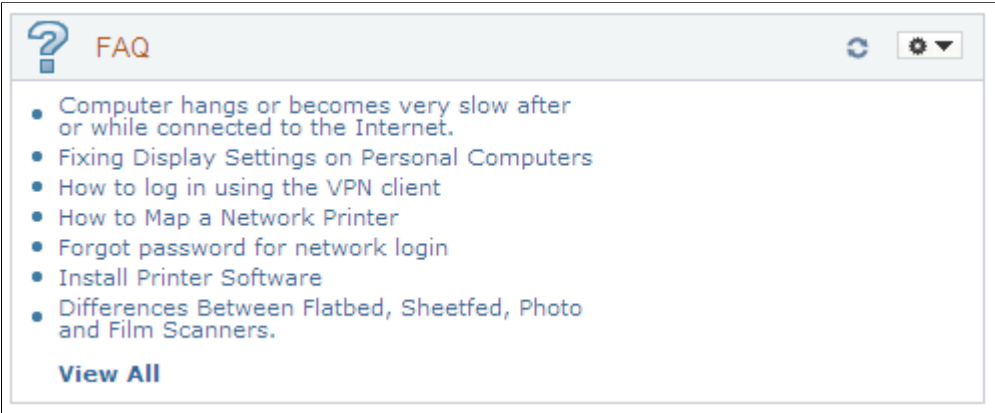


Field or Control	Description
Email Solution	This button enables the user to email the solution.
Yes No	Use these buttons to indicate if the solution resolved your issue.

FAQ Pagelet

Use the FAQ pagelet to view a list of the top FAQ selected by the Administrator.

This example illustrates the fields and controls on the FAQ pagelet.



Field or Control	Description
FAQ	Click an FAQ link to view the details of the FAQ in the Frequently Asked Question page. The FAQ details for the selected FAQ are highlighted in the Frequently Asked Question page.
View All	You can click the View All link to view all FAQ in the Frequently Asked Question page.

You can click an FAQ link to view the description of the FAQ.

Frequently Asked Question Page

Use the Frequently Asked Question page (RC_FAQ_DETAILS_SS) to view the details of an FAQ.

This example illustrates the controls on the Frequently Asked Question page (1 of 2).

Frequently Asked Question	 HR Service Center
Benefits 401K Matching: When is the company match applied to my account? 401K Summary Plan Description (SPD) Annual Performance Review - Overview Annual Performance Review - Salary adjustment Birth/Adoption of a Child - What to do when the child arrives Changing your PCP (Primary Care Physician) How do I enroll in the 401K program? How do I make changes to my Benefits Enrollments? How do I process a rollover into the company 401(k) Plan? How do I request a new 401K Account PIN if I've forgotten mine? How long is a child considered a dependent for Health Benefits? How to view your benefits summary Increasing your 401K deductions with EGTRRA Is Acupuncture covered by Medical benefits? Leaves of Absence Marriage/Begin Domestic Partnership - What to do? U.S. Holiday Schedule 2002 What is my default PIN if I have never accessed the 401(k) hotline or web site? What to do when a Dependent becomes Ineligible for benefits When and how are 401(k) statements released? Where can I find information about the Personal Choice Retirement Account (PCRA) Workers' Compensation FAQs	
Benefits California Birth/Adoption of a Child - What to do when the child arrives Case Resolved in Self-Service How do I enroll in the 401K program? How long is a child considered a dependent for Health Benefits? How to update your Personal Information How will paycheck deductions changes affect my take home pay? Increasing your 401K deductions with EGTRRA Is Acupuncture covered by Medical benefits?	
Life Events Checklist for Pregnancy/Adoption of Child Divorce/End Domestic Partnership - What to do? If You Become Disabled and Cannot Work Leaves of Absence Spouse/Domestic Partner Change in Job Status	

This example illustrates the fields and controls on the Frequently Asked Question page (2 of 2).

Birth/Adoption of a Child - What to do when the child arrives Notify the Benefits department and make any benefits changes within 30 days of your child's arrival. Use the family status change form found online to declare your change. Provide the Benefits department with proof of birth or adoption papers. Enroll your newborn or newly adopted child in company benefits plans within 30 days of the birth date or day of placement. If you do not enroll your child within 30 days, you will have to wait until the next Open Enrollment period unless you experience another qualified family status change. Once enrolled, the effective date of coverage will be retro-active to the birth date or placement date of the baby. Consider the benefits changes described in the Changes to Consider section. You have 30 days to request a change. Consider updating your beneficiary forms, your W-4 withholding information, and your will. To update your tax withholding, complete the tax forms found on the Payroll intranet site.
Changing your PCP (Primary Care Physician) A change in your Primary Care Physician can be done instantly by phoning your Medical Carrier to make the change. You must insure that the new PCP is accepting patients and s/he is an In-Network Provider. In Network Providers in your area can be found at www.yourmedicalcarrier.com .
How do I enroll in the 401K program? First, fill out an enrollment preparation sheet. Then go to the 401Kplan.com Web site to complete your enrollment. Don't forget to use your default PIN (your employee id) when accessing 401KPlan. Enrollments must be completed by the 12th of the month prior to the market close (1 p.m. PST or 4 p.m. EST) in order to take affect in that month's payroll.

Frequently Asked Questions is a single scrollable page that contains a list of all FAQs on the top within the individual topics (or solutions libraries). This list displays only the questions. The bottom portion of the page displays all FAQs with the questions and answers. When the user clicks on any FAQ in the list

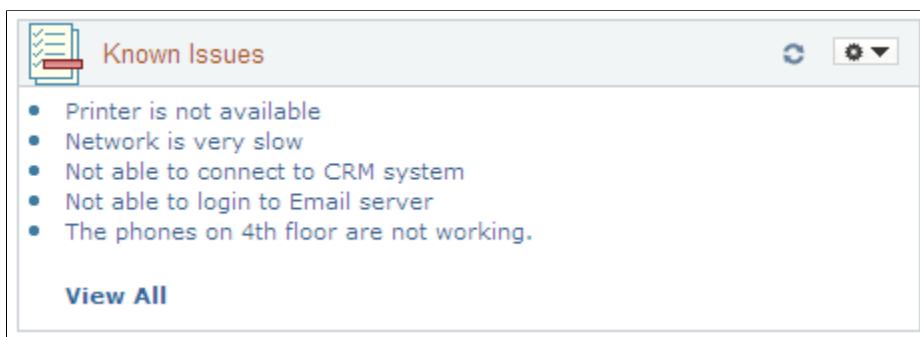
on top of the page, the page scrolls to the section that the FAQ belongs to. The selected FAQ is positioned on top of the page.

The users can alternately click the FAQ link in Quick Links pagelet to get to the FAQ and can click the **<Home Page> Service Center** link to go back to the home page.

Known Issues Pagelet

Use the Known Issues pagelet to view global cases. Global cases are cases that impact multiple users and have been marked as Global.

This example illustrates the fields and controls on the Known Issues pagelet.



<i>Field or Control</i>	<i>Description</i>
Known Issue	The Known Issues pagelet displays 5 most recent cases that have been made accessible to self service users. Click a known issue link to view the Case <ID> page.
View All	Click the View All link to view a list of all known issues in the Known Issues page.

Known Issues Page

Use the Known Issues page (RC_KNOWN_ISSUES_SS) to view a list of all known issues.

Navigation:

Click the **View All** link on the Known Issues pagelet.

This example illustrates the fields and controls on the Known Issues page.

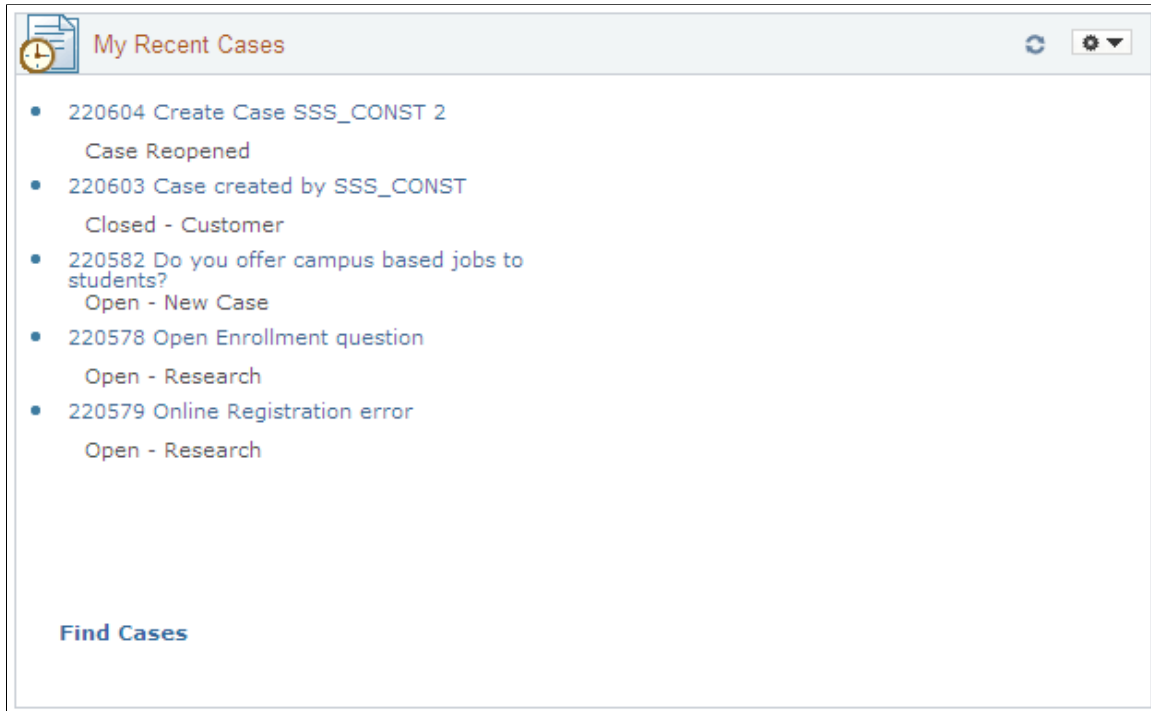
Known Issues  HR Service Center				
Case ID	Summary	Status	Created On	Notify Me
220557	ESPP Enrollment	Open - Research	07/03/2012	☐
220561	Salary increment not on payslip	Open - New	08/01/2012	☒
220562	ESSP Enrollment open period	Open - Research	08/01/2012	☐
220563	Excess State Tax on paycheck	Open - New	08/01/2012	☐
220564	Is Palo Alto Medical group dropped	Open - New	08/01/2012	☐
220565	How to get a printed Payslip	Open - New	08/01/2012	☐
220566	The Holiday list is missing	Open - Research	08/01/2012	☐
220567	10 year anniversary gift taxable	Open-Pend Employee	08/01/2012	☐
220568	New Job Description not in directory	Open - New	08/01/2012	☐
220569	New Baby	Open - New	08/01/2012	☐
220570	Mariatal Status Change	Open-Pend Employee	08/01/2012	☐

Field or Control	Description
Notify Me	Select the check box for a case to receive notifications about the case progress.

My Recent Cases Pagelet

Use the Recent Cases pagelet to view the most recent cases created for the self service user across all Business Units.

This example illustrates the fields and controls on the My Recent Cases pagelet.



The My Recent Cases pagelet displays a maximum of 5 cases and displays the Case ID, Case Summary, and Case Status for each case. The pagelet displays the cases created by the logged in user, an agent, or cases created by another user on behalf of the logged in user.

Field or Control	Description
Link Case	Click the Link Case link to view case details in the Case <ID> page.
Find Cases	Click the Find Cases link to view the Find Cases page. See the <placeholder> topic for more information about the Find Cases page. The Find Cases page allows you to perform a search based on predefined search criteria.

Discussion Forums Pagelet

Use the Discussion Forums pagelet to view and participate in discussions.

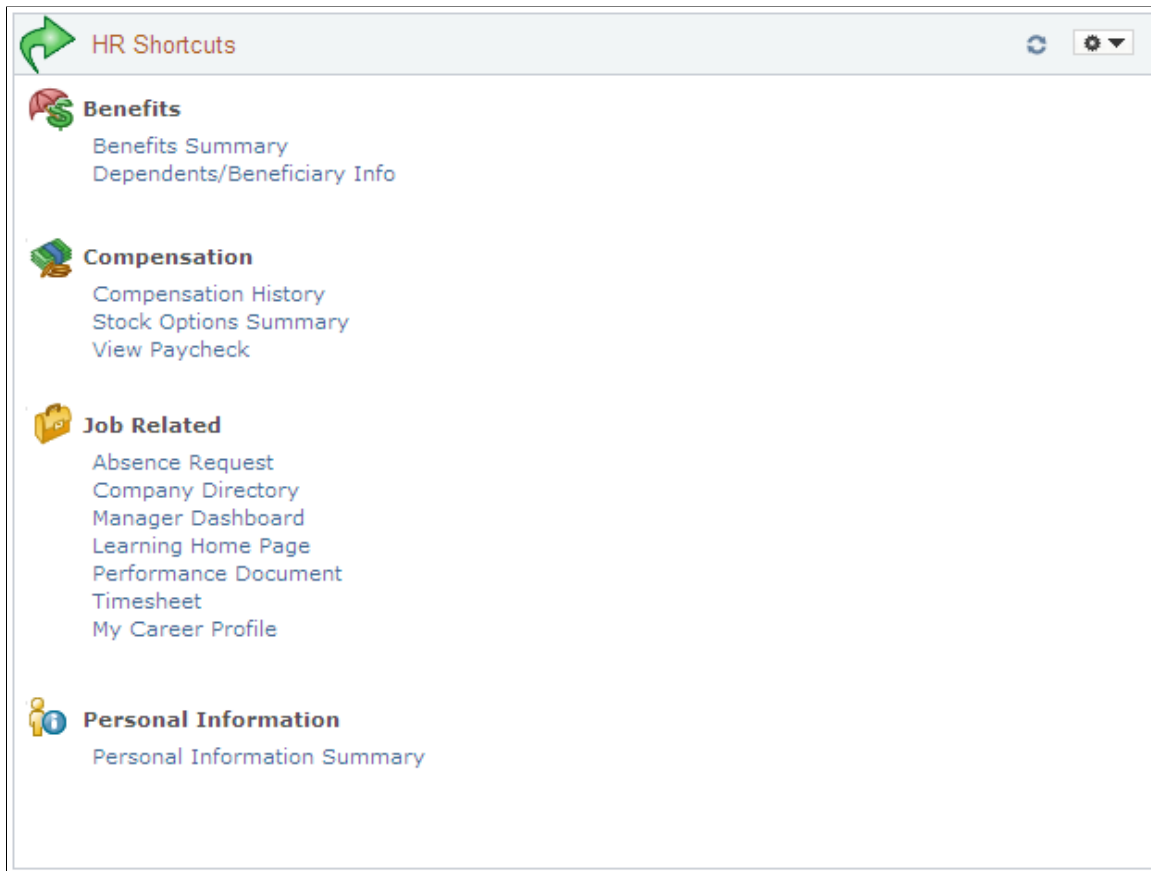
Users can be a member of one or more communities in the Enterprise Portal. The discussion forums pagelet displays the most recent discussion across all communities that the user belongs to.

Note: PeopleSoft CRM does not deliver a pagelet definition for Discussion Forum. See *PeopleSoft HCM 9.1: Viewing Discussion Forum Pagelets within Your Application [ID 1480882.1]* in the [My Oracle Support](#) website for more information on implementing the Discussion Forum pagelet.

Shortcuts Pagelet

Use the Shortcuts pagelet to view links to commonly used components in HCM, EBS, or Campus Solutions. A sample set is available for each pillar. The Administrator can configure their own set of shortcuts. Shortcuts are applicable only to HR Service Center and Campus Service Center Home Pages. The Shortcuts pagelet is called the HR Shortcuts pagelet in the HR Service Center and called Campus Shortcuts for Campus Service Center.

This example illustrates the fields and controls on the HR Service Center - HR Shortcuts pagelet.



The following table lists the category, action, and navigation path of links on the HR Service Center - HR Shortcuts pagelet in PeopleSoft HCM 9.2, 9.1, and 9.0.

All shortcuts in the table have been delivered for 9.2. However, only the shortcuts marked Y are displayed in the delivered HR Shortcuts pagelet. For example, the **Manager Dashboard** link is displayed only if the logged-on user is a manager.

Category	Action	Navigation	HCM 9.2	HCM 9.1	HCM 9.0
Personal Information	Personal Information	Self Service > Personal	Y	Y	Y
Personal Information	Summary				

Category	Action	Navigation	HCM 9.2	HCM 9.1	HCM 9.0
Job Related	Company Directory	Company Directory	Y		
Job Related	Manager Dashboard	Manager Dashboard	Y		
Job Related	Absence Request	Self Service > Time Reporting > Report Time > Absence Request	Y	Y	Y
Job Related	Performance Documents	Self Service > Performance Management > My Performance Management > Current Documents	Y	Y	Y
Job Related	Learning Home	(New in 9.2)	Y		
Job Related	Timesheet	Self Service > Time Reporting > Report Time > Timesheet	Y	Y	Y
Job Related	My Career Profile	Self Service > Career Planning > My Profile	Y	Y	
Compensation	View Paycheck	Self Service > Payroll and Compensation > View Paycheck	Y	Y	Y
Compensation	Compensation History	Self Service > Payroll and Compensation > Compensation History	Y	Y	Y
Compensation	Stock Options Summary	Self Service > Stock Activity > Stock Option Summary	Y	Y	Y

Category	Action	Navigation	HCM 9.2	HCM 9.1	HCM 9.0
Benefits	Benefits Summary	Self Service > Benefits Summary	Y > Benefits	Y	Y
Benefits	Dependents/ Beneficiary Information	Self Service > Benefits Beneficiary Info	Y > Dependents/	Y	Y

The following shortcuts are delivered with the EBS integration for the pagelet HR Shortcuts on the HR Helpdesk home page:

- Person Details
- Payslip
- Total Compensation
- Absence Management
- Benefits Summary

Campus Solutions shortcuts have been delivered only for the CS 9.0 release. The following shortcuts are delivered for in the pagelet Campus Shortcuts on the Higher Education dashboard:

For Student:

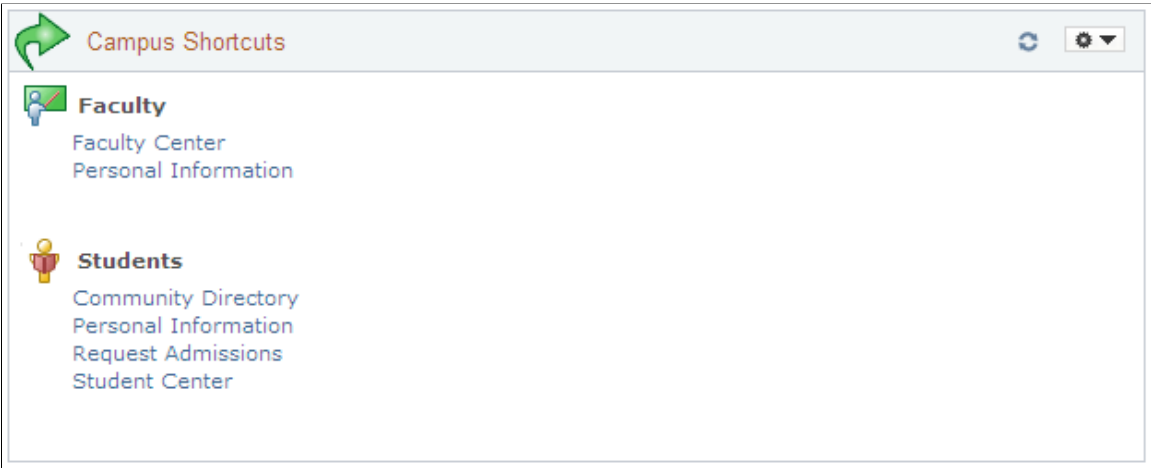
- Student Center (**Self Service > Student Center**)
- Personal Data Summary (**Self Service > Campus Personal Information > Personal Data Summary**)
- Request Admissions Information (**Self Service > Student Admission > Request Information**)
- Community Directory (**Self Service > Community Directory Search**)

For Faculty:

- Personal Information (Self Service > Campus Personal Information > Personal Data Summary)
- Faculty Center (Self Service > My Schedule)

If a user has both roles – student and worker – then all the above shortcuts are displayed for that user.

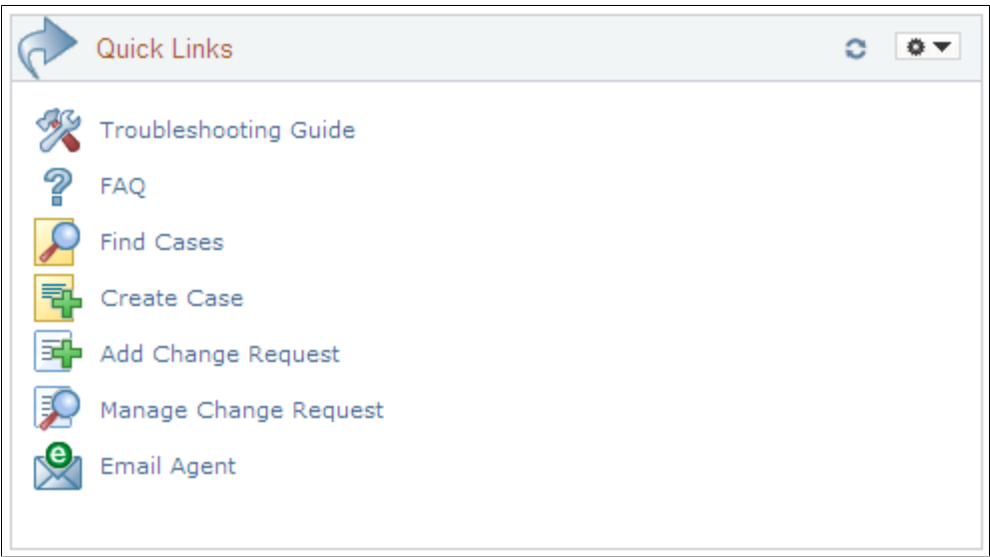
This example illustrates the fields and controls on the Campus Service Center - Campus Shortcuts pagelet.



Quick Links Pagelet

Use the Quick Links pagelet to view a list of quick links to access various features.

This example illustrates the fields and controls on the Quick Links pagelet.



The Quick Links pagelet lists the quick links to access the features that are listed in the table below. The table also indicates the Service Center to which the feature is applicable.

The following table lists the Quick Links and their availability in the different home pages.

Feature	HR Service Center	IT Service Center	Customer Service Center	Campus Service Center
Troubleshooting Guide	Yes	Yes	Yes	Yes

Feature	HR Service Center	IT Service Center	Customer Service Center	Campus Service Center
FAQ	Yes	Yes	Yes	Yes
Find Cases	Yes	Yes	Yes	Yes
Create Case	Yes	Yes	Yes	Yes
Email Agent	Yes	Yes	Yes	Yes
Chat with Agent	Yes	Yes	Yes	Yes
Add Change Request		Yes		
Manage Change Request		Yes		
Internal Contact			Yes	Yes
Customer Selection				Yes
HCM Employee Self-Service	Yes			
HCM Manager Self-Service	Yes			

Creating Cases

The Case Creation process is a simplified user interface through which a self service user can create a case. Instead of showing all case fields on a single page, an administrator can configure multiple steps for the case creation process. The administrator can specify the fields that will be displayed on each page and a description of each step. Display Template is used to set this up. This topic discusses how to create cases.

Pages Used to Add a Case

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Create Case Page</u>	RC_CASE_SS_RPT1 RC_CASE_SS_RPT2 RC_CASE_SS_RPT3	Describe and submit a new problem.
<u>Direct Report Page or Look Up Employee Page</u>	RC_CASE_HD_SS_DIRR	Look up and select an employee for whom you are adding a case. The Add Case for Direct Report link is only available for PeopleSoft HR Service Center and the Add Case for Someone Else link is only available for PeopleSoft IT Service Center.
<u>Edit Contact Information Page</u>	RC_CASE_HD_SS_CNTR	Update contact information for the employee that is the contact on the case.

Create Case Page

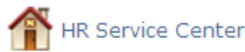
Use the Create Case page (RC_CASE_SS_RPT1, RC_CASE_SS_RPT2, or RC_CASE_SS_RPT3) to describe and submit a new problem.

Navigation:

- **Customer Care > Create Case**
- On the HR Service Center Home Page, click the **Create Case** link on the Quick Links pagelet.
- **Employee Self Service > HR Help Desk > Create Case**
- On the IT Service Center Home Page, click the **Create Case** link on the Quick Links pagelet.
- **Employee Self Service > Help Desk > Create Case**
- On the Campus Service Center Home Page, click the **Create Case** link on the Quick Links pagelet.
- **Service Center > Create Case**

This example illustrates the fields and controls on the HR Service Center - Create Case page (1 of 3).

Create Case



Step 1 of 3: Update Contact 

Create Case For Justin Larson

Add Case for Direct Report

Contact Details Change Contact Information

Edit Contact Details

Next >

Save My Case

This example illustrates the fields and controls on the HR Service Center - Create Case page (2 of 3) of the three step case creation process.

Create Case



Step 2 of 3: Update Problem 

***Summary**

Details



Attach a File

* Required Field

< Previous

Next >

Save My Case

This example illustrates the fields and controls on the HR Service Center - Create Case page (3 of 3) of the three step case creation process.

Create Case

 HR Service Center

Step 3 of 3: Update Details ?

Case Type

Question/Problem

Category

Specialty Type

Detail

Priority

Medium

Severity

One Affected

< Previous

Save My Case

Field or Control	Description
Create Case For	This read-only field displays the name of the customer. It can be the name of the company where the self-service application user works.
Add Case for Direct Report	Click this link if you want to report a case on behalf of one of the people reporting directly to you. The system displays a list of your direct reports. To return to this page, select the employee for whom you want to report a case. Note: The system displays this field for HR Service Center cases only. PeopleSoft delivers this field as enabled with a security option that allows managers with roles that are associated with the Choose Direct Report (RC_CHOOSER_DIRECT_REPORT) functional option to enter cases on behalf of their direct reports. You can use the CRM_HHD display template for the RC_CASE_HD_SS_RPT case component to disable this field or change the security option.

Field or Control	Description
Add Case for Someone Else	Click this link if you want to report a case on behalf of someone else. The system displays a list of workers that are already entered into PeopleSoft CRM. To return to this page, select the worker for whom you want to report a case. Note: The system displays this field for HelpDesk cases only. PeopleSoft delivers this field as enabled with a security option that allows managers with roles that are associated with the On Behalf Of (RC_ON_BEHALF_OF) functional option to enter cases on behalf of other workers. You can use the RC_HELPDESK display template for the RC_CASE_HD_SS_RPT case component to disable this field or change the security option.
Contact Details	This read-only field displays the contact's primary contact method.
Edit Contact Details	Click this link to change the contact person specified in the Customer field or the Employee field.
Attach a File	Click this button to attach a file to the case.
Summary, Details, Case Type, Category, Specialty Type, Detail, Priority, and Severity	Select or enter information in these fields to describe the type of problem you are having.
Save My Case	When the user clicks the Save My Case button, depending on Display Template Details setup, the user is presented with a Submit Confirmation page with the case ID. The user can click the OK button to confirm the submission and view the Case <ID> - Case Information page or the Case ID - Solutions Search page depending on the page set by the Administrator.

This example illustrates the fields and controls on the IT Service Center - Create Case page (single step case creation process).

Create Case

IT Service Center

Employee Robert Harrison

Add Case for Someone Else

Contact Details 925/694-2001(4785)

Edit Contact Details

*Business Unit IT Help Desk

Case Type Technical Question

Product Group

Product

View Product Hierarchy

Problem Type Not Applicable

Asset Tag Not Applicable

Category

Specialty Type

Detail

Priority Medium

Urgency

Severity Onetime Occurrence

*Summary

Details

Attach a File

* Required Field

Save My Case

The visibility of page elements depends on how you configure the display template for this component. Also, some fields can be assigned default values based on business unit settings. The system enters default values even if the fields are hidden.

The Add Case page appears as a single step, two step, or three step process based on how it has been set up by the Administrator in the Display Template for the RC_CASE_SS component.

The display template for Self Service Case allows the administrator to:

- Indicate the number of steps in the case creation process.
- Select the fields to be displayed in each step.
- Enter the label for each step.

See “Configuring Display Templates for Components” (Automation and Configuration Tools).

See [Understanding Call Center Business Units](#)[Understanding Display Templates](#).

Field or Control	Description
Employee	This read-only field displays the name of the employee who entered the case.
Contact Details	This read-only field displays the contact's primary contact method.
Edit Contact Details	Click this link to change the contact person specified in the Customer field or the Employee field.
Business Unit	This field may have a different label, depending on how you configure self-service. This is a required field for cases. If you do not show business units on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page. Note: If the user creates a case using a Business Unit that is different from the default self-service business unit established on the User Preferences - Call Center page, the system will update the user's default self-service business unit value with the newly selected value.
Case Type	Select the type of case you are adding.
Product Group	Select the product group associated with the case you are adding. The system filters the values for product and installed product to only display the products and installed products contained within the specified product group.

Field or Control	Description
Product	Select the product associated with the case you are adding. PeopleSoft Support and PeopleSoft HelpDesk derive the list of products differently: • In PeopleSoft Support, the field prompts against the product descriptions for the user's installed products. A product description appears only once, even if a user has more than one installed version of a particular product. • In PeopleSoft HelpDesk and Service Center for Higher Education applications, the field prompts against all product descriptions.
View Product Hierarchy	Click this link to go to the Installed Product Hierarchy page where you can search for installed products by product ID, product name, site name, and installed status.
Problem Type	Select the problem type associated with the case you are adding. Problem types are defined by product. This gives you an additional level of categorization for the problem. Because problem type is a child of Product, the Problem Type field on the Case page derives its values from product. If the Problem Type field is visible, be sure that the descriptions of your product competencies make sense to a self-service user who is selecting a problem type. Valid problem types depend on the product that the user selects.
Serial Number and Asset Tag	The serial number appears in PeopleSoft Support and PeopleSoft Service Center for Higher Education. The asset tag appears in PeopleSoft IT Service Center and PeopleSoft Campus Service Center. Both fields prompt against the user's installed products. Valid values are limited based on the product that the user selects. Blank values might appear if the user has installed products that do not have serial numbers or asset tags.
Category, Specialty Type, Detail, Priority, Urgency, Severity, Summary, and Details	Select or enter information in these fields to describe the type of problem you are having.

Direct Report Page or Look Up Employee Page

Use the Direct Report page or Look Up Employee page (RC_CASE_HD_SS_DIRR) to look up and select an employee for whom you are adding a case.

The **Add Case for Direct Report** link is only available for PeopleSoft HR Service Center and the **Add Case for Someone Else** link is only available for PeopleSoft IT Service Center..

Navigation:

- Click the **Add Case for Direct Report** link on the Create Case page.
- Click the **Add Case for Someone Else** link on the Create Case page.

This example illustrates the fields and controls on the Direct Report page.

Direct Report

Direct Reports

Select a person Personalize Find View All First 1-7 of 7 Last

Name	Employee ID
Marie Kuhns	KCD006
Claudia Salinger	KUD001
Todd MacPhee	KUD002
George DeAngelis	KUD003
Melissa Rosenberg	KUD004
Carmella Jackson	KUD005
Christian Nevell	KUD006

Cancel

In the Lookup Employee page, enter your search criteria in the fields at the top of the page and then click **Look Up**. Click the name of the employee for whom you are reporting a case. The system returns to the Create Case page.

In the Direct Report page, select the **Name** link for the person you want to create the case for. The name appears in the Create Case for field in the Create Case page.

Note: This page is part of the HelpDesk for Human Resources reported-by feature. The system displays this page, when you click the **Add Case for Direct Report** or **Add Case for Someone Else** link. PeopleSoft enables this link for HelpDesk for Human Resources customers when you first install the application. This field is used to report cases for your direct reports. If you have properly set up the integration between HCM and CRM, then the system retrieves the direct report details directly from the PeopleSoft HCM database.

Edit Contact Information Page

Use the Edit Contact Information page (RC_CASE_HD_SS_CNTC) to update contact information for the employee that is the contact on the case.

Navigation:

Click the **Edit Contact Details** link on the Create Case page.

This example illustrates the fields and controls on the Edit Contact Information page.

Use the fields in the New Contact Information section to change contact information for the case on which you are currently working. To add another contact click the **Select Contact** link. To erase the contact that is displayed, click the **Clear Contact** link. Click **Save** when you are finished. The system returns you to the Create Case page.

Managing Existing Self-Service Application Cases

This topic discusses how to manage existing self-service application cases.

Note: You can display a group box for billing information by selecting this option on the display template. This section is delivered hidden.

Pages Used to Manage Cases

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Find Cases Page</u>	RC_CASE_SW_SS_SRCH RC_CASE_HD_SS_SRCH	Search for cases to view more details.
<u>Case <ID> - Case Information Page</u>	RC_CASE_SW_SS RC_CASE_HD_SS	View case information. This page is also the starting point for several other processes: adding notes, changing contact information, requesting that an agent contact the user, searching for new solutions, and viewing solutions that are already under consideration for this case.

Page Name	Definition Name	Usage
<u>Case <ID> - Notes and Attachments Page</u>	RC_CASE_SW_SS_NDTL RC_CASE_HD_SS_NDTL	View case notes and attachments.
<u>Add Note and Attachment Page</u>	RC_CASE_SW_SS_NADD RC_CASE_HD_SS_NADD	Enter a new case note and attachment. You must save the case to save the note.
<u>Case <ID> - Interested Parties</u>	RC_CASE_SW_SS_INT RC_CASE_HD_SS_INT	View interested parties added by the user or by an agent. The tab also displays the count of the number of interested parties on the case.
<u>Reason for Closing the Case Page</u>	RC_CASE_SW_SS_CLSE RC_CASE_HD_SS_CLSE	Select or enter the reason for closing an open case.
<u>Reason for Reopening the Case Page</u>	RC_CASE_SW_SS_ROMN RC_CASE_HD_SS_ROMN	Select or enter the reason for reopening a closed case. Reopening a case causes all successful resolutions to be marked as failed solutions.
<u>Manage Case - Edit Contact Information Page</u>	RC_CASE_SW_SS_CONT RC_CASE_SW_SS_CNTC RC_CASE_HD_SS_CNTC RC_CASE_HE_SS_CSMR	Change the contact information for a case.

Find Cases Page

Use the Find Cases page (RC_CASE_SW_SS_SRCH or RC_CASE_HD_SS_SRCH) to search for cases to view in more detail.

Navigation:

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the **Find Cases** link on the Quick Links or My Recent Cases pagelet.
- **Employee Self Service > Help Desk > Find Cases**
- **Employee Self Service > HR Help Desk > Find Cases**
- **Customer Care > Find Cases**
- **Service Center > Find Cases**

This example illustrates the fields and controls on the Find Cases page.

Related Links

[Updating Search Descriptions](#)

Case <ID> - Case Information Page

Use the Case <ID> - Case Information page (RC_CASE_SW_SS or RC_CASE_HD_SS) to view case information.

This page is also the starting point for several other processes: adding notes, changing contact information, requesting that an agent contact the user, searching for new solutions, and viewing solutions that are already under consideration for this case.

Navigation:

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click a Link Case link on the My Recent Cases pagelet.
- Select a case from the list of search results on the Find Cases page.

This example illustrates the fields and controls on the Case <ID> - Case Information page.

Case <ID> - Notes and Attachments Page

Use the Case <ID> - Notes and Attachments page (RC_CASE_SW_SS_NDTL or RC_CASE_HD_SS_NDTL) to view case notes and attachments.

Navigation:

On the Case <ID> page, click the **Notes and Attachments** tab.

This example illustrates the fields and controls on the Case <ID> - Notes and Attachments page.

Add Note and Attachment Page

Use the Add Note and Attachment page (RC_CASE_SW_SS_NADD or RC_CASE_HD_SS_NADD) to enter a new case note and attachment.

You must save the case to save the note.

Navigation:

On the Case <ID> - Notes and Attachments page, click the **Add Note or Attachment** button.

This example illustrates the fields and controls on the Add Note and Attachment page.

Use the fields on this page to add notes and attachments. Click the **Add Attachment** button to add files from your computer to the case. Click **Save** when you are finished.

Related Links

“Adding Attachments to Notes” (Application Fundamentals)

Case <ID> - Interested Parties

Use the Case <ID> - Interested Parties page (RC_CASE_SW_SS_INT and RC_CASE_HD_SS_INT) to view interested parties added by the user or by an agent. The tab also displays the count of the number of interested parties on the case.

Navigation:

On the Case <ID> page, click the **Interested Parties** tab.

This example illustrates the fields and controls on the Case <ID> - Interested Parties page.

Case 220598 HR Service Center

Contact me regarding this case Close this case

Case Information | Solutions Search | Solutions Considered (0) | Notes and Attachments (0) | Interested Parties (0)

Interested Parties

There are no interested parties on the case at this time.

[Add Interested Party](#)

For HR Help Desk, the Case <ID> - Interested Parties page is hidden and can be displayed for self-service users by the Administrator.

<i>Field or Control</i>	<i>Description</i>
Add Interested Party	Click the Add Interested Party button to display the Add Interested Party page. Select a Name and Reason Code , and click the Save button to add an interested party to the case.

Reason for Closing the Case Page

Use the Reason for Closing the Case page (RC_CASE_SW_SS_CLSE or RC_CASE_HD_SS_CLSE) to select or enter the reason for closing an open case.

Navigation:

On the Case <ID> page, click the **Close this Case** button. This button is available only if the business unit rules permit self-service users to close cases.

This example illustrates the fields and controls on the Reason for Closing the Case page.

Reason for Closing the Case.

Predefined Reasons

Reason

Other Reason

Details

Save

Cancel

Field or Control	Description
Predefined Reasons and Reason	Select the Predefined Reasons option and then select one of the predefined reasons from the Reason drop-down list box.
Other Reason and Details	Select this option and enter the reason in the Details field if you want to enter a free-form text reason.
Save	When the user clicks this button, the system changes the case status to the value that is specified in the Closed Case Status field on the Case Defaults page. See Case Defaults Page. If a user selects a predefined reason from the Reason field, the system resolves the case by using the solution that is identified on the Reason and Solution Link page. If no solution is linked to the selected reason code, the system creates one (using the solution type <i>Canned</i>) and updates the Reason and Solution Link page accordingly. If a user entered a reason in the Details field, the system uses the text to create a new solution of type <i>Adhoc</i>. The solution then resolves the case using the newly created solution.

- Related Links**
- [Associating Solutions with Reasons for Closing Cases](#)
 - [Setting Up Reason Codes](#)
 - [Case Defaults Page](#)

Reason for Reopening the Case Page

Use the Reason for Reopening the Case page (RC_CASE_SW_SS_ROPN or RC_CASE_HD_SS_ROPN) to select or enter the reason for reopening a closed case.

Reopening a case causes all successful resolutions to be marked as failed solutions.

Navigation:

On the Case <ID> page, click the **Reopen this Case** button. This button is available only if the business unit rules permit self-service users to close cases.

This example illustrates the fields and controls on the Reason for Reopening the Case page.

Reason for Reopening the Case

Predefined Reasons

Reason

Other Reason

Details

Save

Cancel

Field or Control	Description
Predefined Reasonsand Reason	Select the Predefined Reasons option and then select one of the predefined reasons from the Reason drop-down list box. The available reasons include: <i>Problem Re-occurred</i> , and <i>Solution Failed</i> .
Other Reason and Details	Select this option and enter the reason in the Details field if you want to enter a free-form text reason.
Save	When the user clicks this button, the system changes the case status to the value that is specified in the Reopened Case Status field on the Case Defaults page. The reason (either predefined or free-form text) becomes a resolution note.

Related Links

[Associating Solutions with Reasons for Closing Cases](#)

[Setting Up Reason Codes](#)

[Case Defaults Page](#)

Manage Case - Edit Contact Information Page

Use the Manage Case - Edit Contact Information page (RC_CASE_SW_SS_CONT, RC_CASE_SW_SS_CNTC, RC_CASE_HD_SS_CNTC, or RC_CASE_HE_SS_CSMR) to change the contact information for a case.

Navigation:

Click the **Edit Contact Details** Change Contact Information button link on the Create Case page or the Case <ID> page.

This example illustrates the fields and controls on the Manage Case - Edit Contact Information.

The screenshot displays the 'Manage Case - Edit Contact Information' page. At the top, the page title is 'Manage Case' followed by 'Edit Contact Information'. Below this, the case number '220582' is shown. A section titled 'Contact Details' contains the following information: 'Customer' is 'Joseph Ratto', 'Contact Method' is a dropdown menu currently showing 'Phone', and 'Contact Details' is a text field containing '001-9252450614'. At the bottom of the form, there are two buttons: 'Save' and 'Return to Case'.

The appearance of this page varies slightly depending on whether the user is a company contact person (PeopleSoft Support), a consumer (PeopleSoft Support), or a worker (PeopleSoft HelpDesk).

You can change contact information when you are creating a new case or viewing an existing case.

On the Create Case page, the **Change Contact Information** button is available only until the case is submitted. After submitting the case, use the Manage Case - Edit Contact Information page to change the contact information.

Searching for Solutions

This topic discusses how to search for solutions.

Pages Used to Search for Solutions

Page Name	Definition Name	Usage
Search or Solution Search Page	RC_SS_SOLNSRCH RC_CASE_HD_SS_SOLN	Perform a basic solution search.

Page Name	Definition Name	Usage
<u>Case <ID> - Solutions Considered Page</u>	RC_CASE_SW_SS_SOLC RC_CASE_HD_SS_SOLC	View solutions viewed by the self service user or solutions recommended for the case by an agent.
<u>Solution Details or Solution Considered Details Page</u>	RC_SS_SOLNDTLS RC_CASE_SS_RSL_2ND	View a solution and indicate whether the solution solved a problem.

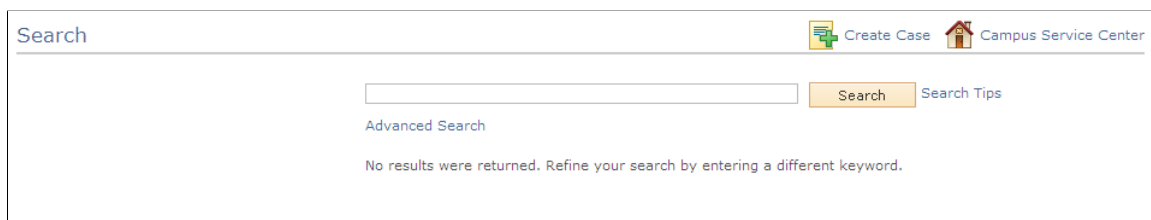
Search or Solution Search Page

Use the Search (RC_SS_SOLNSRCH) or Solutions Search page (RC_CASE_HD_SS_SOLN) to perform a basic solution search.

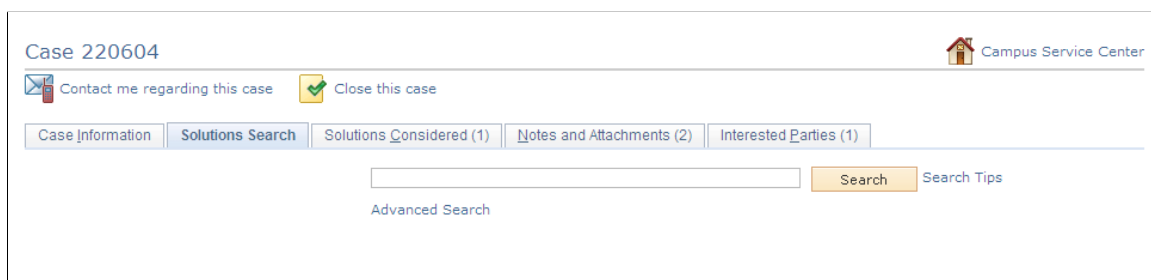
Navigation:

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the **Search** icon on the Search Here for Answers pagelet.
- Click the **Solutions Search** tab in the Case <ID> page.
- **Employee Self Service > Help Desk > Search Solutions**
- **Employee Self Service > HR Help Desk > Search Solutions**
- **Customer Care > Search Solutions**
- **Service Center > Search Solutions**

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



This example illustrates the fields and controls on the Case <ID> - Solutions Search page.



Field or Control	Description
Search Text	Solution Advisor uses PeopleSoft Search to perform keyword search. It takes the keywords entered in this field and search them against the index file that's generated for solutions.
Advanced Search	Click this link to access the Search Solution page for advanced searches, which accepts field-specific search criteria.
Search	Click this button to perform a search. The search results appear at the bottom of the page.
Create Case	This link appears when you are searching for solutions outside the context of a case.
<Self-Service Home Page> Service Center	This link appears when you are searching for solutions within the context of a case.

Case <ID> - Solutions Considered Page

Use the Case <ID> - Solutions Considered page (RC_CASE_SW_SS_SOLC or RC_CASE_HD_SS_SOLC) to view solutions viewed by the self service user or solutions recommended for the case by an agent.

Navigation:

Click the **Solutions Considered** tab on the Case <ID> page.

This example illustrates the fields and controls on the Case <ID> - Solutions Considered page.

Case 220604 Campus Service Center

Contact me regarding this case Close this case

Case Information | Solutions Search | **Solutions Considered (1)** | Notes and Attachments (2) | Interested Parties (1)

Solutions Considered

Description	Status	Did this solve your Problem?
Case Resolved	Failed Resolution	Yes No
Case Resolved		

To search for frequently used solutions, first select a product by clicking the **Choose a Product** link.

Note: Self-service users can only search on active solutions. Solutions that are categorized as either canned or adhoc do not appear in searches on the Case <ID> - Solutions Considered page for both agents and self-service users.

Solution Details or Solution Considered Details Page

Use the Solution Details page (RC_SS_SOLNDTLS) or the Solution Considered Details page (RC_CASE_SS_RSL_2ND) to view a solution and indicate whether the solution solved a problem.

Navigation:

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click a Solution link on the Top Solutions pagelet.
- Click a Solution Summary link in the Case <ID> - Solutions Considered tab.

This example illustrates the fields and controls on the Solution Details page.

Solution Details HR Service Center

Email Solution

Summary What is the Employee Stock Purchase Plan, or ESPP?

Symptoms What is the Employee Stock Purchase Plan, or ESPP?

Details

The Employee Stock Purchase Plan, or ESPP, administered by Stock Administration in the Finance department, continues to be one of the most popular benefit programs we offer. Like the 401(k) program, you don't enroll in the ESPP during benefits enrollment. Since the ESPP has very specific-and quite rigid-rules around enrollment, there's a special section on "How to Enroll" in the Employee Stock Purchase Plan document. ESPP Plan Highlights The plan allows you to contribute from 1 to 10 percent of your total compensation paid during the offering period-including base salary, bonuses, commission, overtime pay, and/or other compensation-toward the purchase of the company's common stock at a discounted price. Contributions are made through automatic payroll deductions, on a monthly or semimonthly basis, depending on your salary structure. Contributions are calculated off your gross pay but deducted on an after-tax basis. The offering period is for 6 months and the purchase price is calculated based on 85% of the lesser of the fair market value of the stock at the beginning of the period or the end of the period. New employees who are eligible for the April or October offering, will have stock purchased based on the lesser of the April/October price or the price at the end of the period.

You can check your stock option summary following this [link](#).

Did this solution resolve your issue?

Standalone Usage Counts

Solved Count	0	Usage Count	0
Datetime Added	03/31/2009 11:13AM	Last Modified	11/19/2012 11:14AM

Use this page to review the details of a solution and indicate if the solution solved your problem.

If a solution has related solutions, then the system lists the related solutions under Attachments on the Solution Summary Page. By Clicking the Related Solution the user can view the Related Solution Summary.

Accessing FAQs

This topic discusses how to access FAQs.

Pages Used to Access FAQs

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Frequently Asked Questions Page</u>	RC_FAQ_DETAILS_SS	View a list of frequently asked questions and the corresponding details.

Frequently Asked Questions Page

Use the Frequently Asked Questions page (RBT_FAQ_SOL_SS) to view a list of frequently asked questions and the corresponding details.

Navigation:

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click an FAQ or the **View All** link on the FAQ pagelet.
- **Employee Self Service > Help Desk > FAQ**
- **Employee Self Service > HR Help Desk > FAQ**
- **Customer Care > FAQ**
- **Service Center > FAQ**

This example illustrates the fields and controls on the Frequently Asked Question page.

Frequently Asked Question

 HR Service Center

Benefits

401K Matching: When is the company match applied to my account?

401K Summary Plan Description (SPD)

Annual Performance Review - Overview

Annual Performance Review - Salary adjustment

Birth/Adoption of a Child - What to do when the child arrives

Changing your PCP (Primary Care Physician)

How do I enroll in the 401K program?

How do I make changes to my Benefits Enrollments?

How do I process a rollover into the company 401(k) Plan?

How do I request a new 401K Account PIN if I've forgotten mine?

How long is a child considered a dependent for Health Benefits?

How to view your benefits summary

Increasing your 401K deductions with EGTRRA

Is Acupuncture covered by Medical benefits?

Leaves of Absence

Marriage/Begin Domestic Partnership - What to do?

U.S. Holiday Schedule 2002

What is my default PIN if I have never accessed the 401(k) hotline or web site?

What to do when a Dependent becomes Ineligible for benefits

When and how are 401(k) statements released?

Where can I find information about the Personal Choice Retirement Account (PCRA)

Workers' Compensation FAQs

Benefits California

Birth/Adoption of a Child - What to do when the child arrives

Case Resolved in Self-Service

How do I enroll in the 401K program?

How long is a child considered a dependent for Health Benefits?

Selecting and Running Troubleshooting Guides

This topic discusses how to select and run troubleshooting guides.

Pages Used to Select and Run Troubleshooting Guides

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Troubleshooting Guide Page	RBT_TGUIDE_SS	Select a troubleshooting guide.
Execute Script Page	RC_BS_SELF_CONFIG	Run a troubleshooting guide script.

Troubleshooting Guide Page

Use the Troubleshooting Guide page (RBT_TGUIDE_SS) to select a troubleshooting guide.

Navigation:

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the **Troubleshooting Guide** link on the Quick Links pagelet.
- **Employee Self Service > Help Desk > Troubleshooting Guide**
- **Employee Self Service > HR Help Desk > Troubleshooting Guide**
- **Customer Care > Troubleshooting Guide**
- **Service Center > Troubleshooting Guide**

This example illustrates the fields and controls on the Troubleshooting Guide page.

[HelpDesk](#)

Troubleshooting Guide

This Troubleshooting Guide will identify your problem and offer the most likely solution.
Select a topic from the drop-down menu.

Topic

*Business Unit

HR HelpDesk

▼

*Guide

▼

*Script Name

▼

Launch

[Return to HelpDesk](#)

* Required Field

Field or Control	Description
Business Unit	This field may have a different label, depending on how you configure self-service. If you do not show a business unit on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page.
Guide	Select from a list of solution libraries that you set up in the Troubleshooting Guide setup page. Each library is associated with a single script.
Script Name	Select the script name populated for the solution library.
Launch	Click to display the Execute Script page and run the script that is associated with the selected library.

Execute Script Page

Use the Execute Script page (RC_BS_SELF_CONFIG) to run a troubleshooting guide script.

Navigation:

On the Troubleshooting Guide page, select a solution library and script name, and click the **Launch** button.

This example illustrates the fields and controls on the Execute Script page.

The screenshot displays the 'Execute Script' page with the following elements:

- Page Title:** Execute Script
- Navigation Links:** View Variables, View Comments, View Responses
- Section Header:** Benefits Troubleshooting-SS
- Message:** Hello Jorge Menendez. Welcome to the Troubleshooting Guide! What type of Benefits question do you have?
- Radio Button List:**
 - ☒ Benefits Change
 - ☐ Benefits Related
 - ☐ Disability
 - ☐ FSA Plan
 - ☐ Health Insurance
 - ☐ Leave Plans
 - ☐ Life Insurance
 - ☐ Pension
 - ☐ Savings Plans
 - ☐ Vacation Buy/Sell
 - ☐ Other
- Comment Field:** A text area for user comments.
- Buttons:** Finish, Save, Next

See “Running Scripts on Self-Service Pages” (Automation and Configuration Tools).

Using the Fluid User Interface to View and Manage HR HelpDesk Self Service Application Transactions

Understanding Employee Self Service Home Page

This topic describes the delivered home page for Employee Self-Service.

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Employee Self Service Home Page	CR_RC_IT_EMP_SELF_SERVICE	Access a variety of employee self-service application transactions.

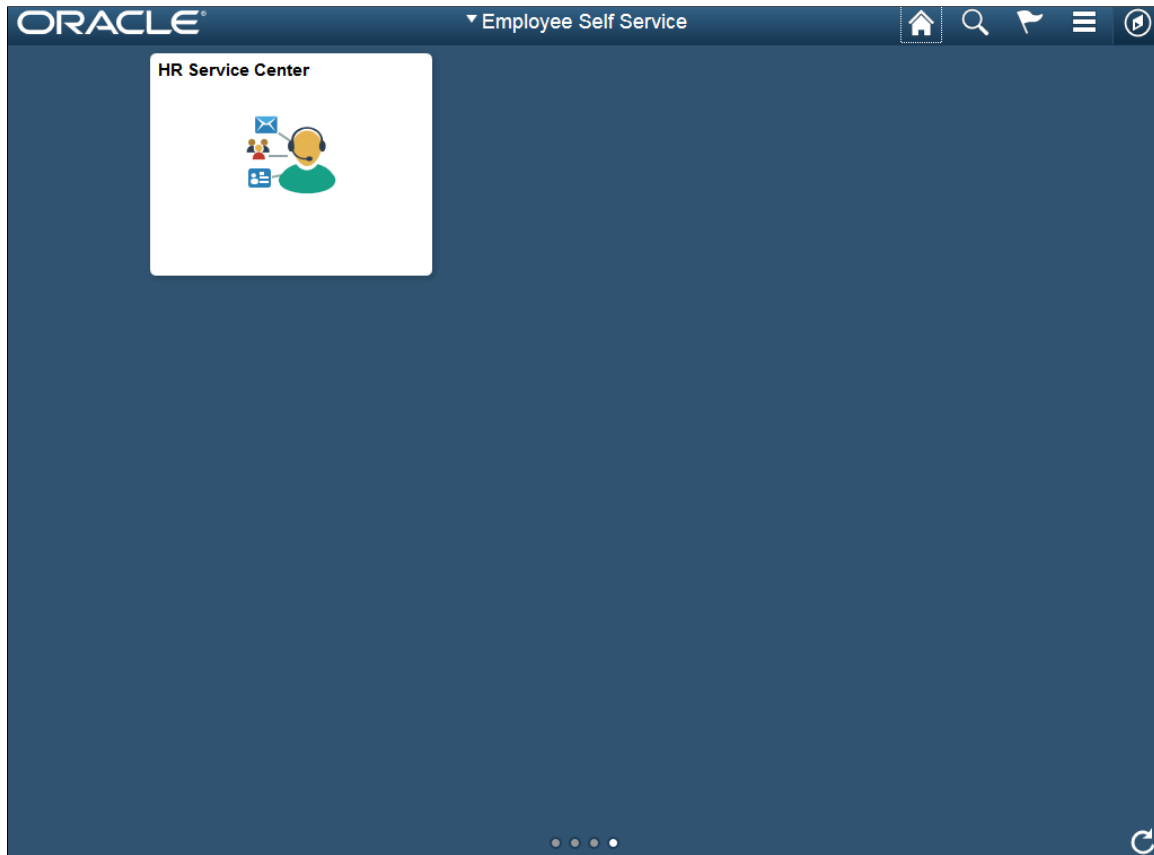
Employee Self Service Home Page

Use the Employee Self-Service home page to access a variety of employee self-service transactions. The cref for this home page is CR_RC_IT_EMP_SELF_SERVICE.

Navigation:

In fluid mode, the fluid home appears when you first sign in. The default home page title appears at the top of the home page. If the Employee Self-Service home page is not your default home page, click the title of the default home page and select Employee Self-Service from the list that appears.

This example illustrates the Employee Self-Service home page for the tablet.



This example illustrates the Employee Self-Service home page for the smartphone.



For details on action buttons, which appear on the page banner when viewed with a smartphone or tablet, see “Understanding Banners in PeopleSoft Fluid User Interface” (Enterprise Components).

HR Service Center Dashboard

The HR Service Center dashboard displays various tiles that facilitate the employee to view relevant information and to take necessary actions such as searching for answers, creating a case, viewing cases they created, and the like.

Navigation:

Click the HR Service Center tile on the Employee Self Service home page to access the HR Service Center dashboard.

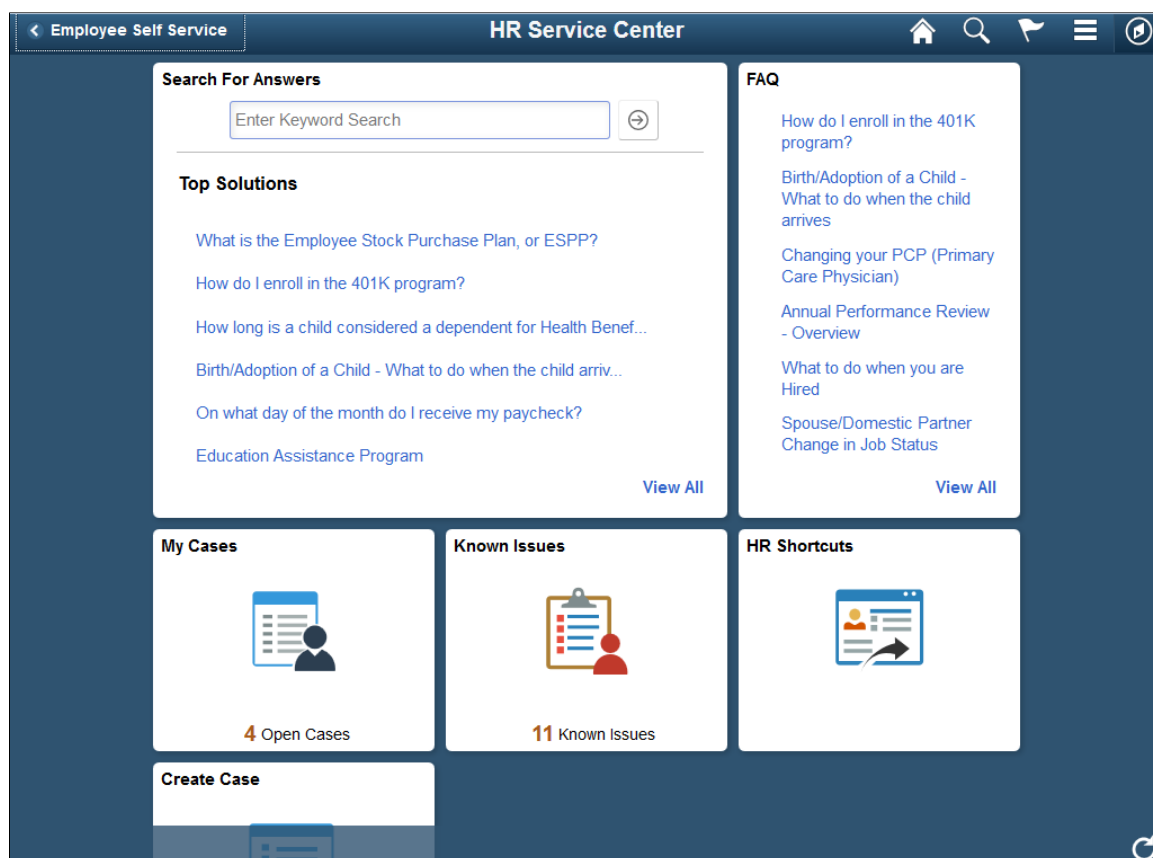
Employee Self Service Home Page

Use the Employee Self-Service home page to access a variety of employee self-service transactions. The cref for this home page is CR_RC_IT_EMP_SELF_SERVICE.

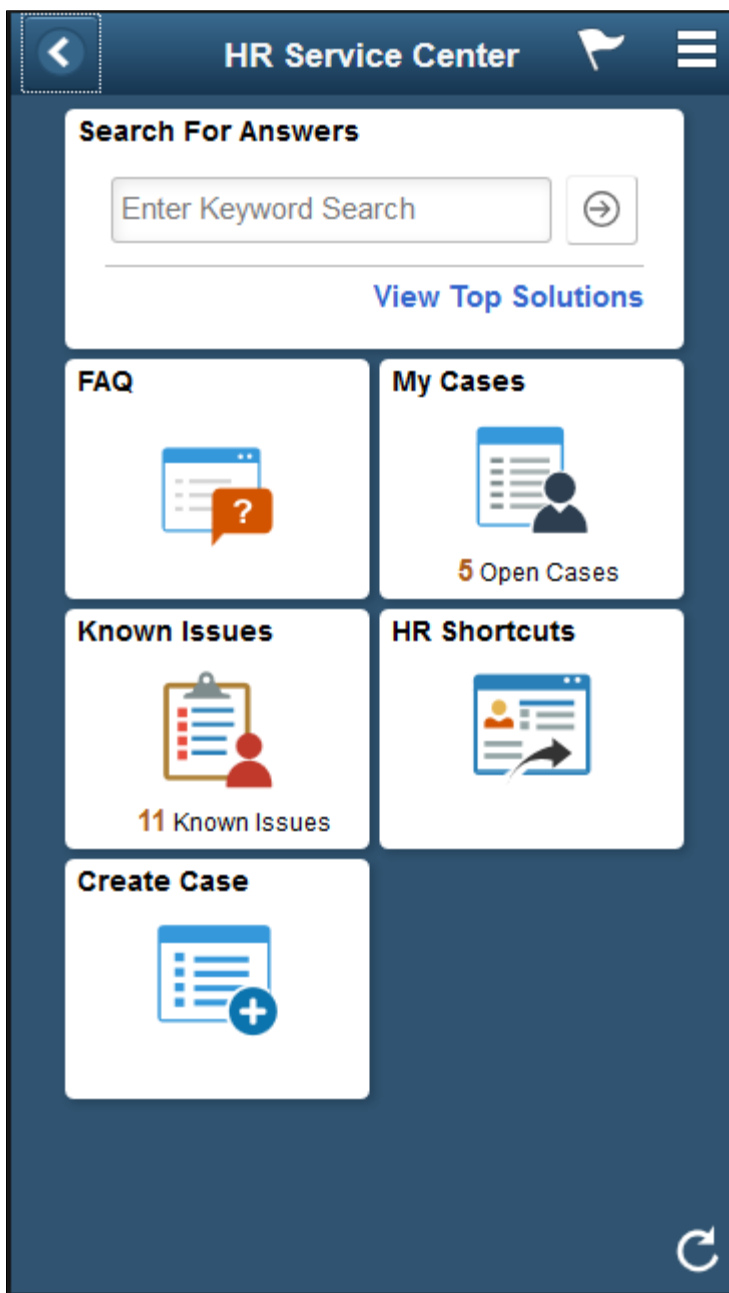
Navigation:

In fluid mode, the fluid home appears when you first sign in. The default home page title appears at the top of the home page. If the Employee Self-Service home page is not your default home page, click the title of the default home page and select Employee Self-Service from the list that appears.

This example illustrates the HR Service Center dashboard for the tablet.



This example illustrates the HR Service Center dashboard for the smart phone.



Note: The behavior and appearance of tiles displayed in the HR Service Center dashboard can be changed as per requirements.

PeopleSoft CRM Tiles on the HR Service Center Dashboard

The following table describes the tiles on the delivered HR Service Center dashboard.

Use the links in the table to access complete documentation for each transaction.

<i>Tile Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Search for Answers Tile</u>	CR_RC_SS_SRCH_FL_GBL	Allows user to search for cases and find corresponding solutions and also enables users to access Top Solutions or Known Issues pages.
<u>FAQ Tile</u>	CR_RC_SS_FAQ_FL_GBL	Access Frequently Asked Questions page, where you can view a list of top frequently asked questions selected by the administrator based on categories.
<u>Create Case Tile</u>	CR_RC_SS_CCASE_FL_GBL	Access Create Case wizard, where you can describe and submit a new problem using a step by step guided process.
<u>My Cases Tile</u>	CR_RC_CASE_SS_SRCH_FL_GBL	Access My Cases page, where you can view a list of cases related to the user.
<u>Top Solutions Tile</u>	CR_RC_SS_TOPSOLN_FL_GBL	Access Top Solutions page, where you can view the list of top solutions configured by the administrator.
<u>Known Issues Tile</u>	CR_RC_SS_ISSUES_FL_GBL	Access Known Issues page to view a list of all known issues.
<u>HR Shortcuts Tile</u>	CR_RC_SS_HR_SHORTS_FL_GBL	Access the HR Shortcuts page to view links to commonly used components in HCM.
<u>Browse By Topic Tile</u>	CR_RC_SS_BROWSE_TL_FL_GBL	Allow users to browse for solutions by specific topics. The tile displays a maximum of 11 topics which the users can set up, to facilitate their search for relevant solutions.

Using the PeopleSoft Fluid Interface to Search Answers

This topic discusses how employees use the PeopleSoft Fluid User Interface to search for answers.

Pages Used to Search Answers Using the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Search Results Page</u>	RC_SS_SRCH_ANS_FL	Use the Search Results page to view content related to the search keyword in specific category.
<u>Solution Details Page</u>	RC_SS_SOLN_DTL_FL	Use the Solution Details page to view the details of the solution and number of people who found the solution as helpful.

Search for Answers Tile

Use the Search for Answers tile to access top solutions, known issues, or troubleshooting guides based on requirement.

This tile has two sections. The first section enables the employees to search for answers, while the second section enables to access top solutions or known issues . By default, the second section displays top solutions configured by the administrator.

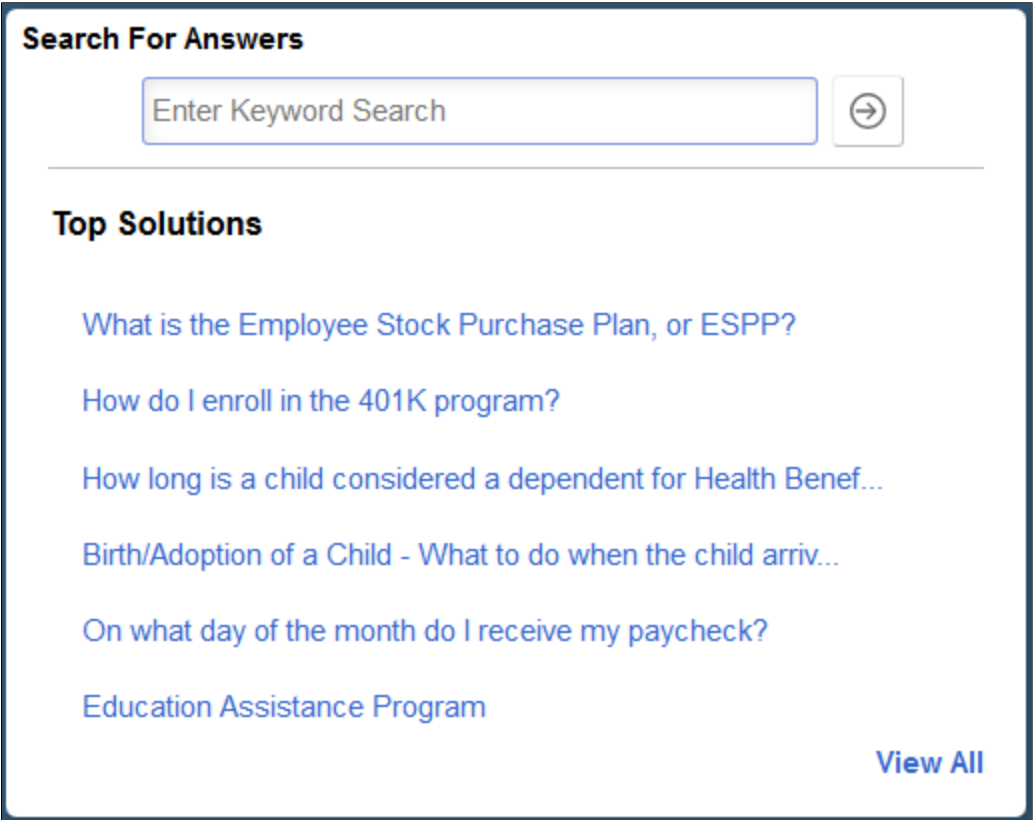
An administrator can decide which section they want the organization to view when the employees log in to HR Service Center dashboard. This is based on a URL field parameter setting in the Fluid Attributes tab of Search for Answers - Content Ref Administration page. If known issues need to be displayed, set Additional Parameters field value as DISP_TMPL_FAM_CD=CRM_HHD&TYPE=KNOWN_ISSUES. If top solutions need to be displayed, set Additional Parameters field value as DISP_TMPL_FAM_CD=CRM_HHD&TYPE=TOPSOLUTIONS. (Navigation: PeopleTools, Portal, Structure and Content, Fluid Structure and Content, Fluid Pages, HR HelpDesk Self Service, Search for Answers, Edit, Fluid Attributes).

Note: The Known Issues section displays 6 most recent cases that have been made accessible to self-service users.

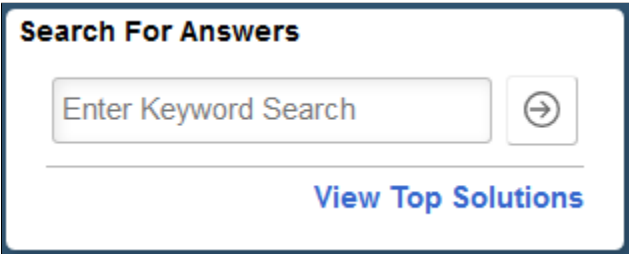
Navigation:

Click the HR Service Center tile available in the Employee Self Service home page. The Search for Answers tile is available on the HR Service Center dashboard.

This example illustrates the Search for Answers tile for the tablet.



This example illustrates the Search for Answers tile for the smartphone.



Field or Control	Description
	Click on the Search icon, after entering the keywords in Search field. Search results are displayed in the Search Results page.
View All	Click this link to open the corresponding page listing all top solutions or known issues based on configuration.

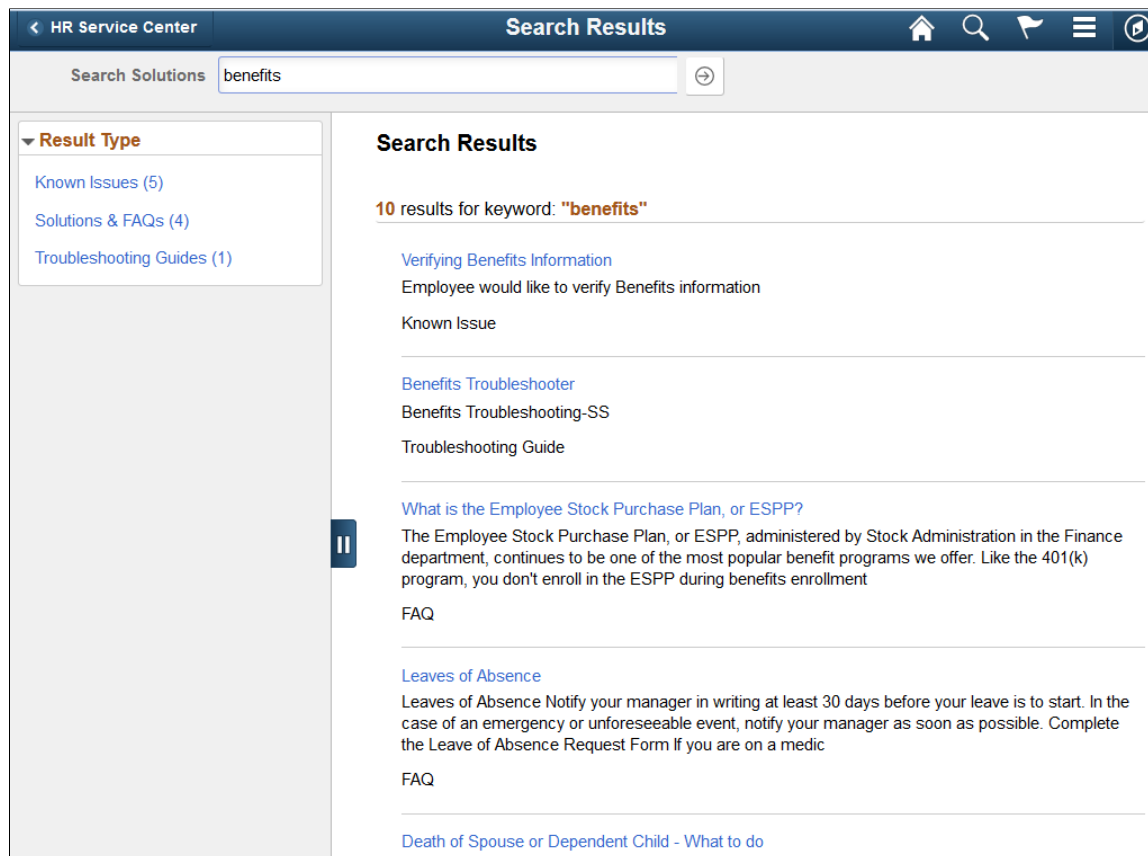
Search Results Page

Use the Search Results page to view content related to the search keyword in specific category.

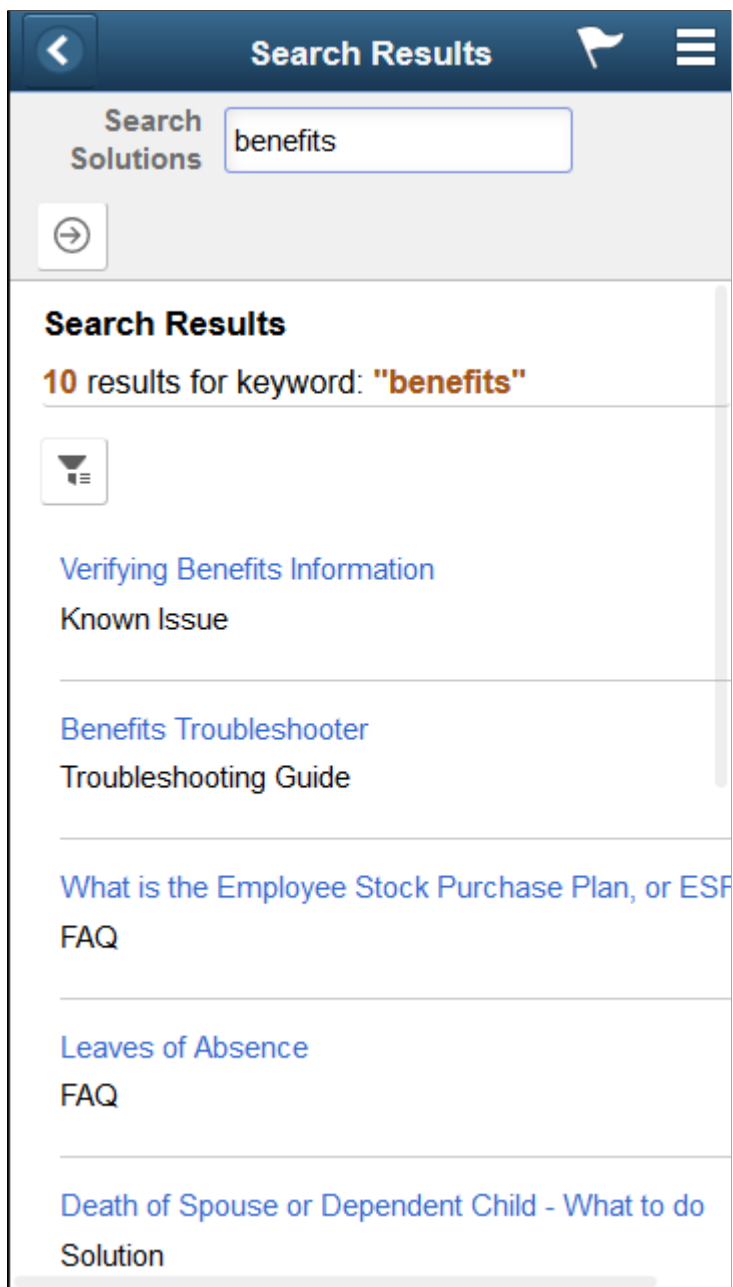
Navigation:

Specify a keyword or leave the search field blank and click the Search icon in the Search For Answers tile.

This example illustrates the Search Results page for the tablet.



This example illustrates the Search Results page for the smartphone.



When you perform a keyword search the results are displayed in a new page. The results display the summary, type of result, and number of people who found the result as helpful. The result type is displayed in the last line. Only content specific to the Display Template Family's Business Units is displayed in the search results. If the user has BU security set up, only content relevant to the Business Units that the user can access will be displayed in the search results.

It is also possible to search again, if the search results do not have the relevant information.

You can refine the search results based on Result Type. The values available are:

- Solutions and FAQ
- Known Issues

- Troubleshooting Guides

You can drill down further into the search results based on sub filters. Sub filter options are displayed based on the selected Result Type.

Search results can be boosted based on boosting attributes. For details on defining boosting attributes, see “Search Boost Page” (Automation and Configuration Tools).

Solution Details Page

Use the Solution Details page to view the details of the solution and number of people who found the solution as helpful.

Navigation:

Click a solution link in Search Results page to view the corresponding Solution Details page.

This example illustrates the fields and controls on the Solution Details page.

The screenshot shows the 'Solution Details' page in the HR Service Center. The title bar includes a back arrow, 'HR Service Center', 'Solution Details', and navigation icons. The main content area has a heading 'What is the Employee Stock Purchase Plan, or ESPP?' and states '8 people found this helpful.' The body text describes the ESPP program, its enrollment rules, and contribution details. A link is provided to check the stock option summary. At the bottom, there is a section 'Was this solution helpful?' with radio buttons for 'Yes' and 'No' (selected). Below this are two buttons: 'Email Solution' and 'Add Feedback'.

Note: The look and feel of Solution Details page varies based on result types selected.

Field or Control	Description
Yes and No radio buttons	Use these radio buttons to indicate whether the solution is helpful or not. The selection made by the employee for whether the solution was helpful or not, will be retained for the employee's logged in session. Based on self-service helpful count, the administrator gets the feedback on the effectiveness of the solution and depending on this, the administrator can decide which solution can be marked as the top solution. If you select No, you are redirected to Solution Feedback modal window. For details, see Solution Feedback Modal Window.
Email Solution	This button enables the user to e-mail the solution to themselves or another person(s).
Add Feedback	This button enables the user to provide feedback while viewing a top solution.

Solution Feedback Modal Window

Use the Solution Feedback modal window to provide a feedback.

Navigation:

Click Add Feedback button on the Solution Details page.

This example illustrates the Solution Feedback modal window.

Solution Feedback ×

[Help](#)

Select a feedback type and provide a description. Select Done to Submit the feedback, you will not be able to see the feedback once its submitted.

*Type ▼

*Description

Done **Cancel**

Field or Control	Description
Type	Select the feedback type. You can configure the required feed back types in the Feedback Type page. For details, see “Feedback Type Page” (PeopleSoft Services Foundation)
Description	Meaningful description of the feedback.

Note: ‘Type’ and ‘Description’ are mandatory fields.

Using the PeopleSoft Fluid Interface to View FAQ

Employees use the Frequently Asked Questions (FAQ) tile to access the Frequently Asked Questions page.

Note: If no FAQ is configured by the administrator or if no FAQ is applicable for the logged in user, the FAQ tile is displayed as 1X1 tile.

Pages Used to View FAQ

Page Name	Definition Name	Usage
<u>FAQ Tile</u>	CR_RC_SS_FAQ_FL_GBL	Use the Frequently Asked Questions (FAQ) tile to access the Frequently Asked Questions page.
<u>Frequently Asked Questions Page</u>	RC_SS_FAQ_FL	Use the Frequently Asked Questions page to view a list of FAQ configured by the administrator.

FAQ Tile

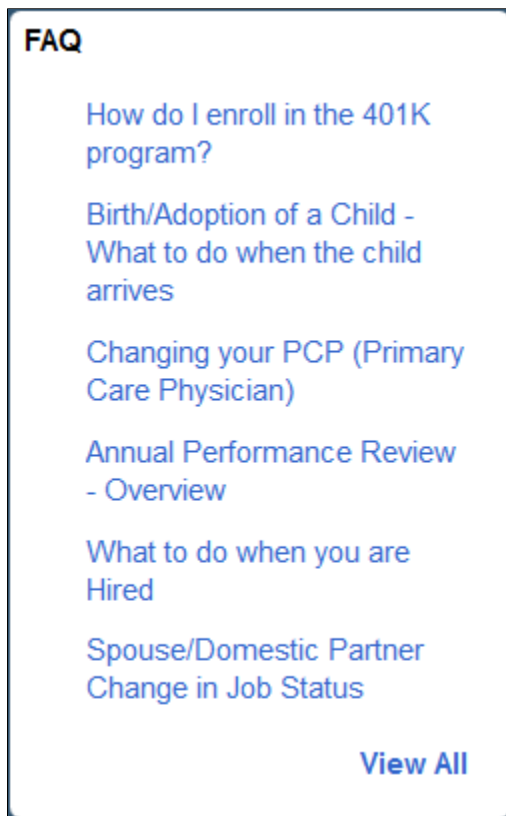
Employees use the Frequently Asked Questions (FAQ) tile to access the Frequently Asked Questions page.

Note: If no FAQ is configured by the administrator or if no FAQ is applicable for the logged in user, the FAQ tile is displayed as 1X1 tile.

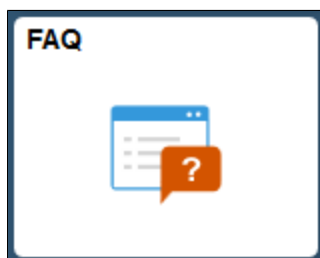
Navigation:

Click the HR Service Center tile available in the Employee Self Service home page. The Frequently Asked Questions tile is available on the HR Service Center dashboard.

This example illustrates the FAQ tile for the tablet.



This example illustrates FAQ tile for the smartphone.



This tile displays a list of questions that are frequently asked by the employees. You can also view all the FAQs by clicking View All.

Frequently Asked Questions Page

Use the Frequently Asked Questions page to view a list of FAQ configured by the administrator.

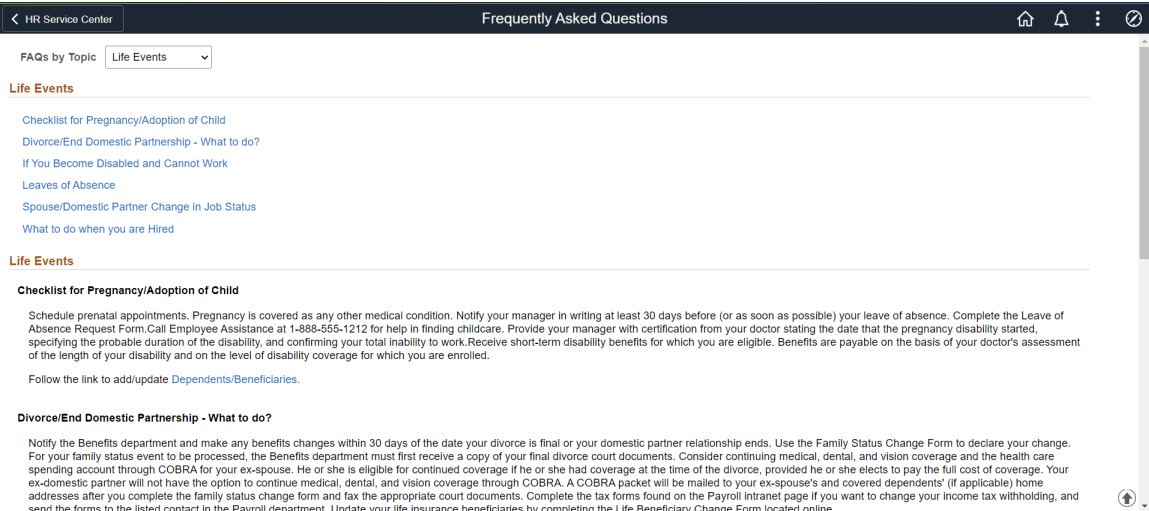
Frequently Asked Questions is a single scrollable page that contains two portions; questions within the topics and “questions and answers”. When the user clicks on any question in the list on top of the page, the page scrolls to the section that the FAQ belongs to.

Note: User can view only the solutions from authorized solution libraries. For more details on defining solution library security, see Solution Library Security section in Finding and Attempting Solutions.

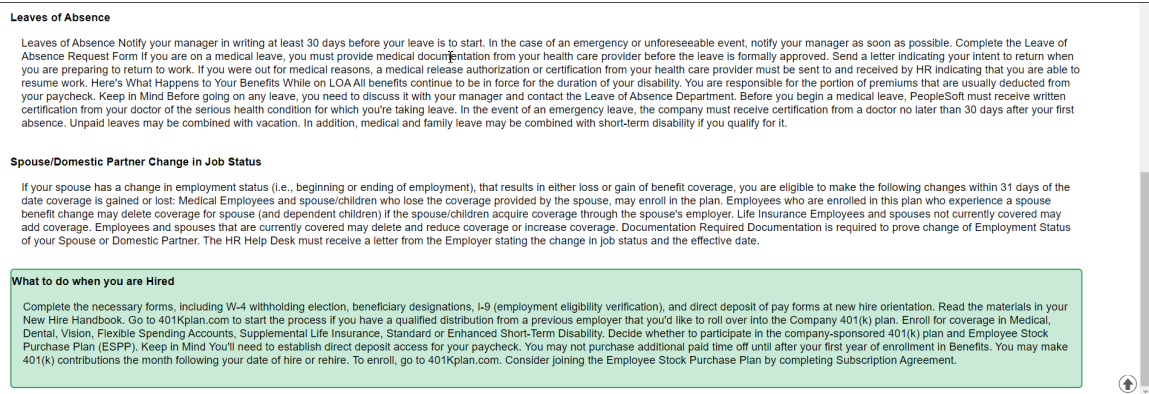
Navigation:

- Click View All link available in the FAQ tile to access the Frequently Asked Questions page.
- Click a particular FAQ link displayed in the FAQ tile to access the corresponding answer. The selected FAQ is highlighted.

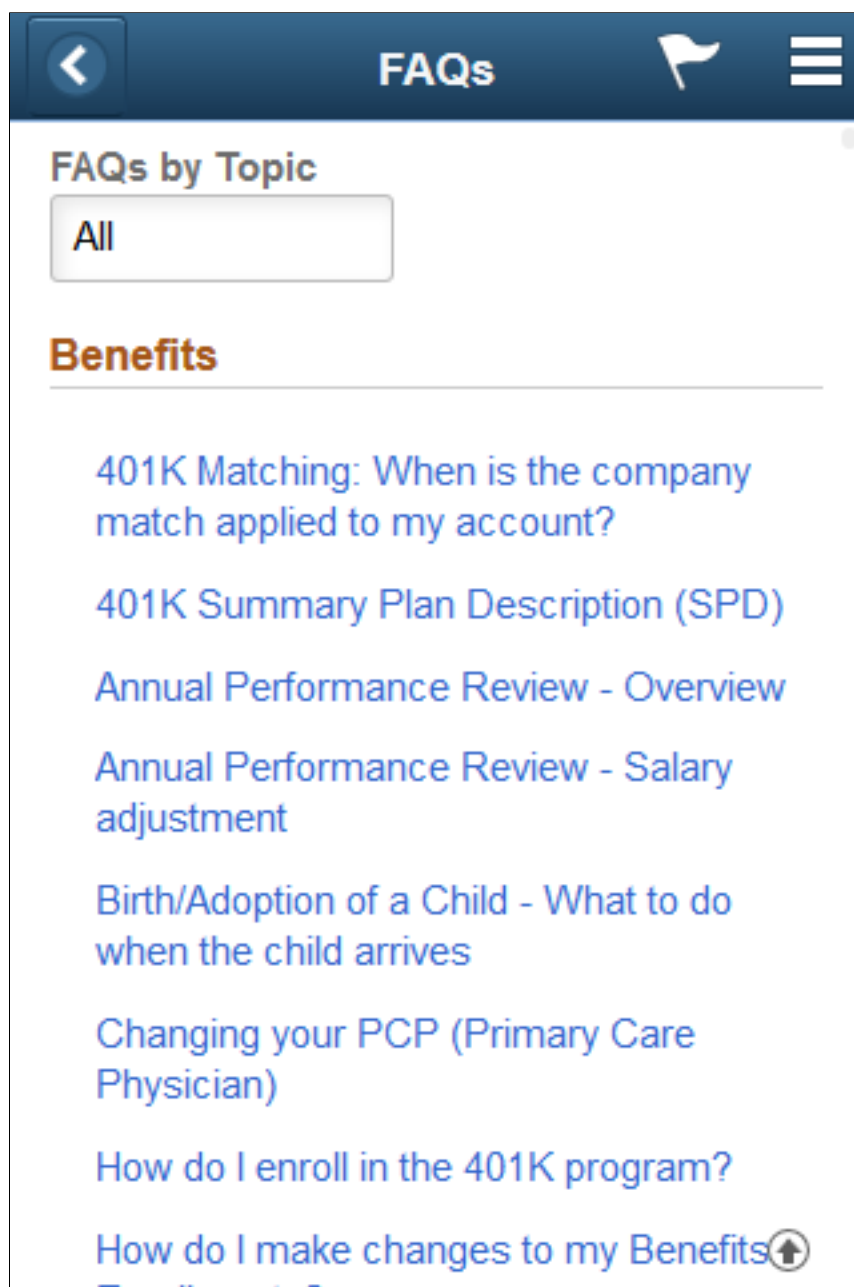
This example illustrates the Frequently Asked Questions page for the tablet (1 of 2).



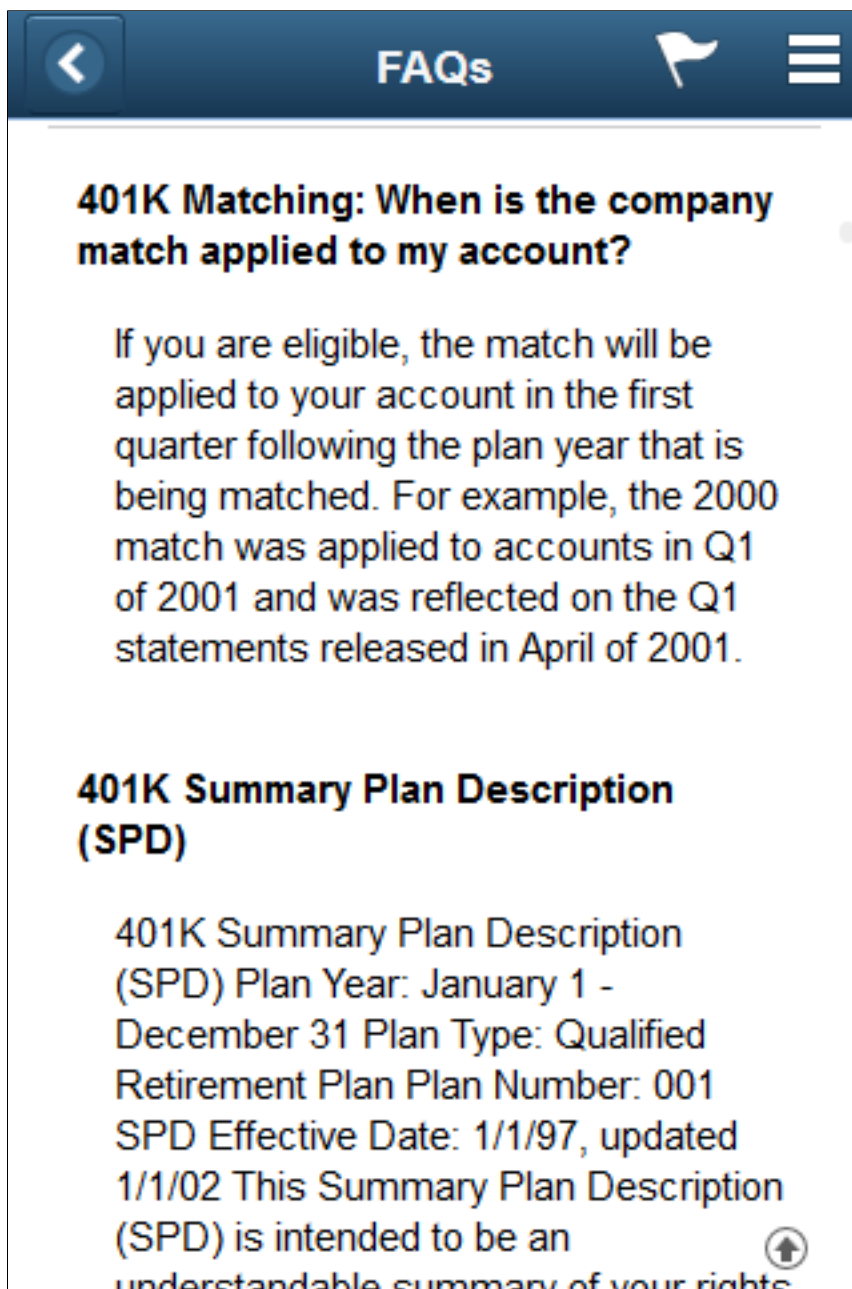
This example illustrates the Frequently Asked Questions page for the tablet (2 of 2). You can view the FAQ selected directly from the tile as highlighted.



This example illustrates the Frequently Asked Questions page for the smartphone (1 of 2).



This example illustrates the Frequently Asked Questions page for the smartphone (2 of 2).



For example, if you want to view a list of FAQ corresponding to Benefits California, select Benefits California in the FAQs by Topic field. In this case, only the questions corresponding to Benefits California are displayed in the Frequently Asked Questions page.

Using the PeopleSoft Fluid Interface to Create Case

Employees use the Create Case tile to access the Create Case wizard.

Pages Used to Create Case

Page Name	Definition Name	Usage
<u>Create Case Tile</u>	CR_RC_SS_CCASE_FL_GBL	Use Create Case tile to access Create Case wizard, where you can describe and submit a new problem using a step by step guided process.
<u>Create Case Wizard</u>	RC_SS_HHD_STEP1_FL	Use Create Case page to select or enter category, type, and details of the case.
<u>Create Case — Enter Details Page</u>	RC_SS_HHD_STEP2_FL	Use Enter Details page to specify the case details and attaching file(s) to the corresponding case.
<u>Create Case — Review and Submit Page</u>	RC_SS_HHD_SUBMT_FL	Use Review and Submit page to review and submit the case.

Note: Starting with Update Image 23, administrators can configure questionnaire events in the Questionnaire Framework to trigger questionnaires for employees after they submit cases, for example, to request additional information about submitted cases. Employees receive in-app notifications about these questionnaires from Notification Composer, and can access the questionnaires directly from the notifications. For more information on setting up the Questionnaire Framework to trigger questionnaires when cases are submitted, see “Configuring and Creating Questionnaire Event” (Enterprise Components) and “Example of Triggering Questionnaires Automatically From Applications” (Enterprise Components).

Create Case Tile

Employees use the Create Case tile to access the Create Case wizard..

Navigation:

Click the HR Service Center tile available in the Employee Self Service home page. The Create Case tile is available on the HR Service Center dashboard.

This example illustrates the Create Case tile for the tablet.



This example illustrates the Create Case tile for the smartphone.



Create Case Wizard

Use the Create Case wizard to describe and submit a new problem using a step by step guided process.

The Case Creation process is a guided process through which a self-service user can create a case. Instead of showing all case fields on a single page, an administrator can configure multiple steps for the case creation process. The administrator can specify the fields that will be displayed on each page and a description of each step. Display Template is used for setting this up.

The visibility of page elements depends on how you configure the display template for this component. Also, some fields can be assigned default values based on business unit settings. The system enters default values even if the fields are hidden

The Create Case wizard can be a single step, two step, three step, or four step process based on how it has been set up by the Administrator in the Display Template (CRM_HHD_CCASE_FL).

The display template for Self Service Case allows the administrator to:

- Control individual step description in the case creation process.
- Select the fields to be displayed in each step.
- Enter the label for each step.

For details on display template setup, see “Pages Used to Configure Display Templates for Components” (Automation and Configuration Tools) and [Appearance and Behavior Control](#)

When a case is created or updated, push notifications are triggered. For more details on push notifications, refer Understanding the Push Notification Framework in *PeopleTools: Fluid User Interface Developer's Guide*.

By default, the Create Case Guided Process involves the following three steps:

1. Select Category
2. Enter Details
3. Review and Submit

This topic will take you through the pages involved in these steps.

Navigation:

Click the Create Case tile to access the Create Case wizard. Select Category page is displayed, by default.

This example illustrates the fields and controls on the Select Category page for the tablet.

The screenshot displays the 'Create Case' interface on a tablet. At the top, a dark blue header bar contains an 'Exit' button with a close icon, the title 'Create Case', a 'Next >' button, and a hamburger menu icon. Below the header, a progress bar shows three steps: '1 Select Category' (highlighted with a green circle), '2 Enter Details', and '3 Review and Submit'. The main content area has a light gray background and contains the following text and form elements:

To Help us serve you better, please select the details below. Alternately you could skip this and continue to the next step.

Category

Type

Detail

This example illustrates the fields and controls on the Select Category page for the smartphone.

X

Create Case

>

≡

Step 1 of 3

To Help us serve you better, please select the details below. Alternately you could skip this and continue to the next step.

Category

Q

Type

Detail

Field or Control	Description
Category, Type, and Details	Select or enter information in these fields to describe the type of problem you are having.

Create Case — Enter Details Page

Use Enter Details page to specify the case details and attaching file(s) to the corresponding case.

Navigation:

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Click step 2 or Enter Details, at the top of the page to navigate to the Enter Details page in the guided process.

This example illustrates the fields and controls on the Create Case — Enter Details page for the tablet.

✕ Exit

Create Case

< Previous

Next >

☰

1

2

3

Select Category

Enter Details

Review and Submit

Case Details

*Summary

Description

Priority

Low

Attachments

You have no attachments.

Add Attachments

Create Case For

Employee

Claudia Salinger

Contact Details

Contact

Claudia Salinger

Phone

925/694-4921

If the logged in user is a manager, the Enter Details page is displayed as shown:

✕ Exit

Create Case

< Previous

Next >

☰

1

2

3

Select Category

Enter Details

Review & Submit

Case Details

*Summary

Description

Priority

Medium

Attachments

You have no attachments.

Add Attachments

Create Case For

Create Case For

Carolyn Blum

Case Contact

Name

Carolyn Blum

Phone

222/333-4444

This example illustrates the fields and controls on the Enter Details page for the smartphone.

Create Case

Step 2 of 3

Case Details

*Summary

Description

Priority Medium

Attachments

You have no attachments.

Add Attachments

Create Case For

Create Case For Carolyn Blum

Case Contact

Name Carolyn Blum

Phone 222/333-4444

Field or Control	Description
Case Summary, Description, and Priority	Select or enter information in these fields to describe the type of problem you are having.
Add Attachment	Click this button to attach a file to the case.
Create Case For	This field displays the name of the employee.

Field or Control	Description
Contact Details	This read-only field displays the contact's primary contact method.
	Click this button in the Create Case For field to report a case on behalf of one of the people reporting directly to you. The system displays a list of your direct reports.
	Click this button in the Case Contact field to change the contact person specified in the Customer field or the Employee field.

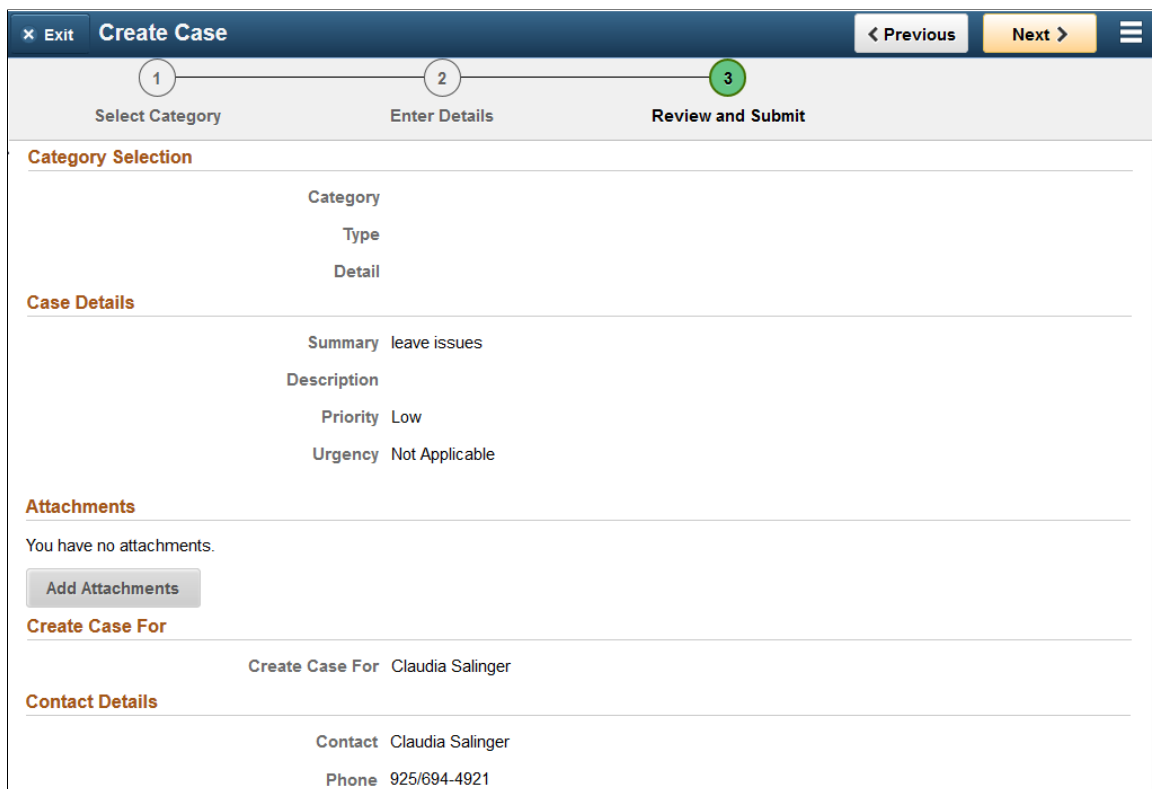
Create Case — Review and Submit Page

Use Review and Submit page to review and submit the case.

Navigation:

Click step 3, Review and Submit, at the top of the page to navigate to the Review and Submit page in the guided process.

This example illustrates the fields and controls on the Review and Submit page for the tablet.



Exit
Create Case
Previous
Next

1 Select Category
2 Enter Details
3 Review and Submit

Category Selection

Category

Type

Detail

Case Details

Summary leave issues

Description

Priority Low

Urgency Not Applicable

Attachments

You have no attachments.

Add Attachments

Create Case For

Create Case For Claudia Salinger

Contact Details

Contact Claudia Salinger

Phone 925/694-4921

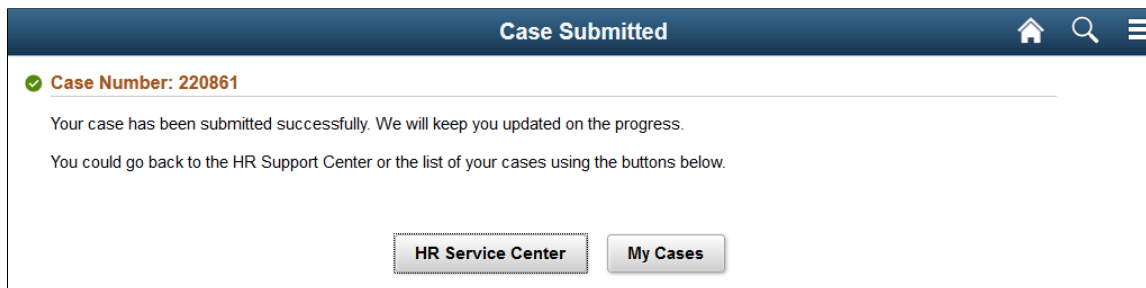
This example illustrates the fields and controls on the Review and Submit page for the tablet.

The screenshot shows a mobile interface for creating a case. At the top, there is a blue header bar with a close button (X), the title 'Create Case', a back arrow, a yellow 'Submit' button, and a menu icon (three horizontal lines). Below the header, a progress bar indicates 'Step 3 of 3'. The main content area is divided into several sections, each with a title and a horizontal line separator:

- Category Selection**: Contains three labels: 'Category', 'Type', and 'Detail'.
- Case Details**: Contains two labels: 'Summary' (with the value 'leave issues') and 'Description' (with the value 'Priority Medium').
- Attachments**: Contains the text 'You have no attachments.'
- Create Case For**: Contains two labels: 'Create Case' and 'For' (with the value 'Carolyn Blum').

Click Submit button to submit the case. When the user clicks the Submit button, the user is presented with a Case Submitted page with the case number as shown.

This example illustrates the Case Submitted page with the case number.



The user can click HR Support Center button to go back to the HR Service Center landing page.

Click MY Cases button to view the list of cases created by the user.

Enabling Suggested Solutions for HRHD Fluid Self Service Cases

PeopleSoft Suggested Solutions feature enables users to view helpful solutions while creating a case. You can search solutions based on Case Category, Type, and Details (CTD).

To enable suggested solutions feature:

- Suggested Solutions Count check-box available in Call Centre Definition Page (Self- Service section) should always be checked and select an appropriate value. For details, see [Defining Call Center Business Units](#).
- Suggested Solutions check-box in Business Unit — Options page should be checked. For details, see [Defining Call Center Business Units](#)

Viewing Suggested Solutions

To view suggested solutions,

1. Login as an employee, click HR Service Center tile available on the Employee Self Service home page.
2. Click Create Case tile.
3. Select case category, type, and detail as per requirements. Suggested solutions for the selected CTD are displayed in the Suggested Solutions section based on the availability or setup.

Create Case Wizard – Select Category page

You can drill down to solution details and can mark solution as helpful or not. After creating the case, viewed solutions are tagged to the case with appropriate status such as In consideration, Failed Resolution, and Viewed. Based on the solution status an agent can able to figure out whether the solution is useful for the employee or not.

It is also possible for the agent to set up solutions with appropriate CTD by means of Call Center Business Unit page. For details on fields and explanations of this page, see [Defining Call Center Business Units](#).

Note: You can also search for Solutions by means of Search Solutions tile.

The number of solutions displayed is based on a suggested solution count which can be specified in Business Unit – Options page. For details, see [Defining Call Center Business Units](#)

Using the PeopleSoft Fluid Interface to View Top Solutions

Employees use the Top Solutions tile to access the Top Solutions page.

Note: By default, the Top Solutions tile is not available in the HR Service Center dashboard. This tile can be enabled as per requirement. For details on enabling the tiles on home pages, refer [Setting the Pagelets or Tiles That Appear on Home Pages](#) section in *PeopleTools: Portal Technology*.

Pages Used to View Top Solutions

Page Name	Definition Name	Usage
Top Solutions Tile	CR_RC_SS_TOPSOLN_FL_GBL	Use the Top Solutions tile to access Top Solutions page.
Top Solutions Page	RC_SS_TOPSOLN_FL	Use the Top Solutions page to view a list of solutions configured by the administrator, if any.
Solution Details Page	RC_SS_SOLN_DTL_FL	Use the Solution Details page to view the details of the solution and number of people who found the solution as helpful.

Top Solutions Tile

Employees use the Top Solutions tile to access the Top Solutions page.

Navigation:

Click the HR Service Center tile on the Employee Self Service landing page to access HR Service Center dashboard. The Top Solutions tile is displayed on the HR Service Center dashboard.

This example illustrates the Top Solutions tile for the tablet.



This example illustrates the Top Solutions tile for the smart phone.



The tile shows the total number of top solutions selected by the administrator.

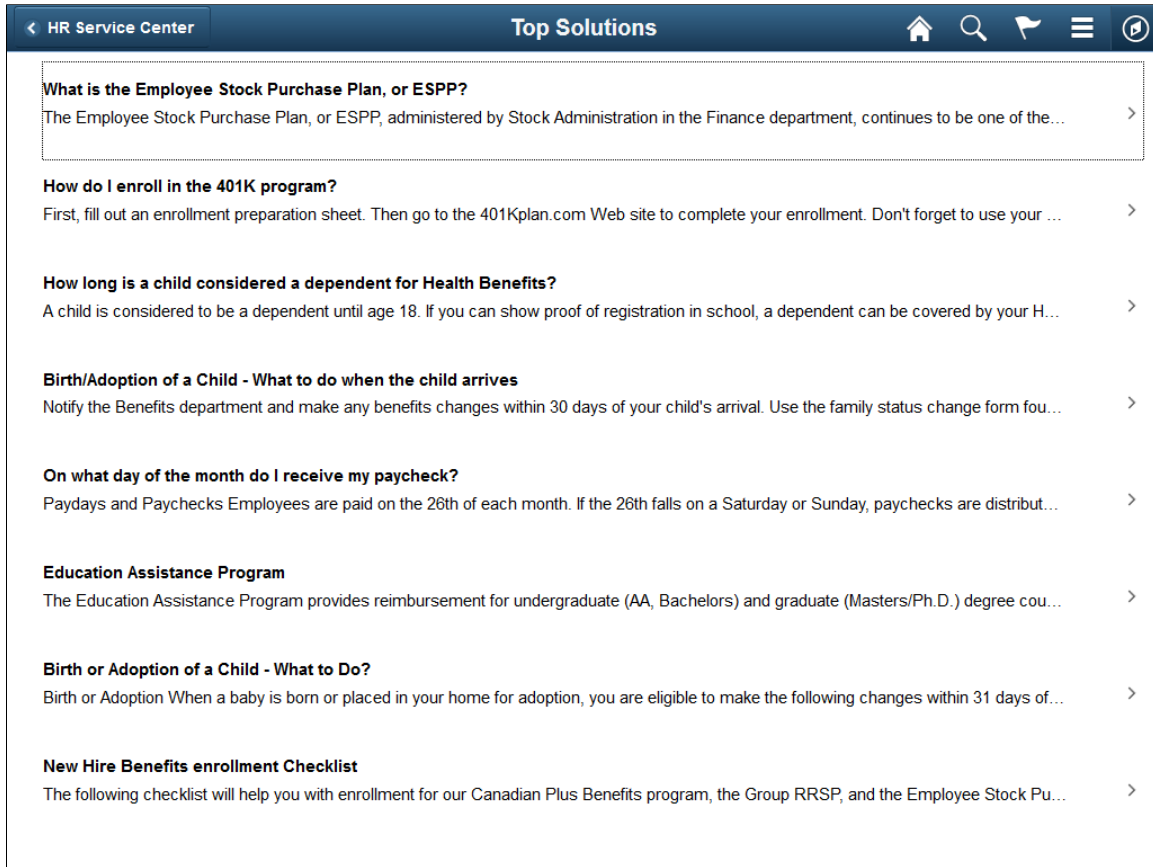
Top Solutions Page

Use the Top Solutions page to view a list of solutions configured by the administrator, if any. User can view only the solutions from authorized solution libraries. For more details on defining solution library security, see “Finding and Attempting Solutions” (PeopleSoft Services Foundation).

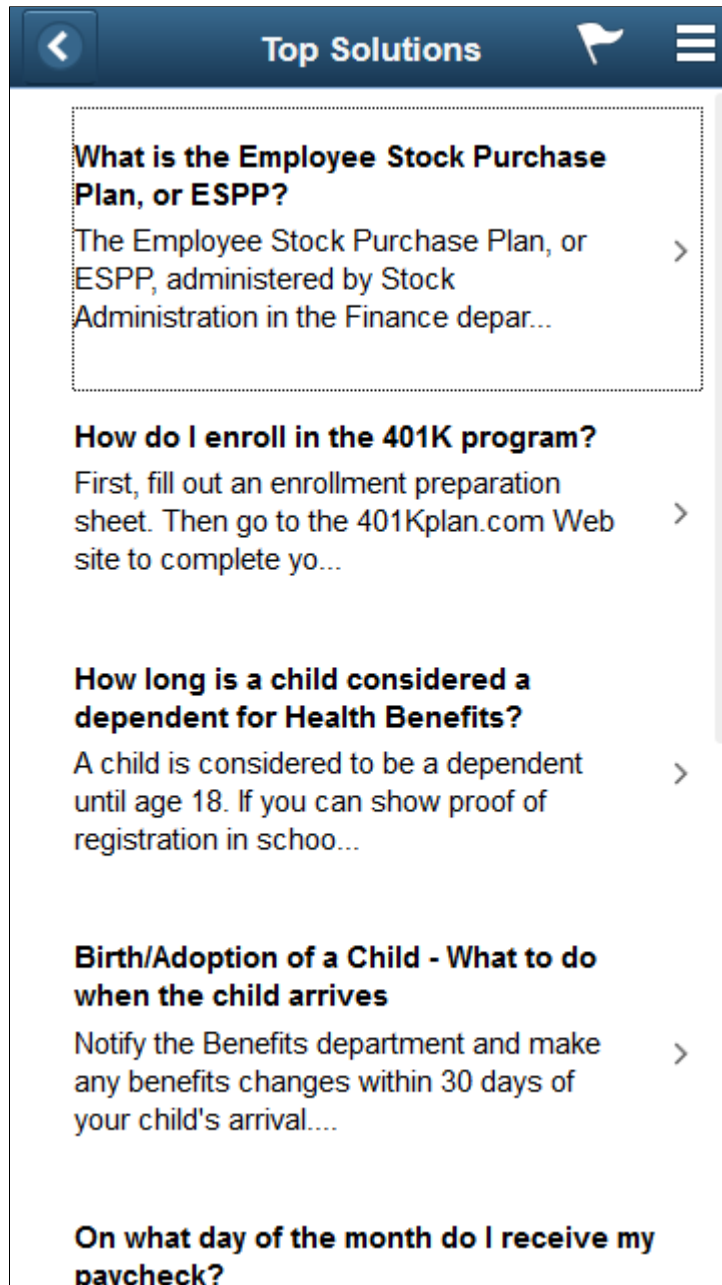
Navigation:

- Click the Top Solutions tile to access the Top Solutions page.
- Top Solutions page can also be accessed as part of Search for Answers.

This example illustrates the Top Solutions page for the tablet.



This example illustrates the Top Solutions page for the smartphone.



Click a solution link to view the corresponding Solution Details page.

Solution Details Page

Use the Solution Details page to view the details of the solution and number of people who found the solution as helpful.

Navigation:

Click a solution link in the Top Solutions page to view the corresponding Solution Details page.

This example illustrates the Solution Details page for the tablet.

HR Service Center
Solution Details

What is the Employee Stock Purchase Plan, or ESPP?

8 people found this helpful.

The Employee Stock Purchase Plan, or ESPP, administered by Stock Administration in the Finance department, continues to be one of the most popular benefit programs we offer. Like the 401(k) program, you don't enroll in the ESPP during benefits enrollment. Since the ESPP has very specific-and quite rigid-rules around enrollment, there's a special section on "How to Enroll" in the Employee Stock Purchase Plan document. ESPP Plan Highlights The plan allows you to contribute from 1 to 10 percent of your total compensation paid during the offering period-including base salary, bonuses, commission, overtime pay, and/or other compensation-toward the purchase of the company's common stock at a discounted price. Contributions are made through automatic payroll deductions, on a monthly or semimonthly basis, depending on your salary structure. Contributions are calculated off your gross pay but deducted on an after-tax basis. The offering period is for 6 months and the purchase price is calculated based on 85% of the lesser of the fair market value of the stock at the beginning of the period or the end of the period. New employees who are eligible for the April or October offering, will have stock purchased based on the lesser of the April/October price or the price at the end of the period.

You can check your stock option summary following this [link](#).

Was this solution helpful?

☐ Yes
☒ No

Email Solution

Add Feedback

Field or Control	Description
Attachments	If there is any file attached in the solution, then it gets displayed in the Attachments section.
Yes and No radio buttons	Use these radio buttons to indicate whether the solution is helpful or not. The selection made by the employee for whether the solution was helpful or not, will be retained for the employee's logged in session. Based on self-service helpful count, the administrator gets the feedback on the effectiveness of the solution and depending on this, the administrator can decide which solution can be marked as the top solution.
Email Solution	This button enables the user to e-mail the solution to themselves or another person(s).
Add Feedback	This button enables the user to provide feedback while viewing a top solution.

This example illustrates the Email Solution modal window.

Cancel
Email Solution
Send

*To

Subject

Stu Marx has sent you a solution for What is the Employee Stock Purchase PI

Message

Add an optional note

Attachments

1 row

Include	File Name	Description	Datetime Added
Yes	Stock.txt	Stock Details	11/07/2018 3:35AM

Solution Feedback Modal Window

Use the Solution Feedback modal window to provide a feedback.

Navigation:

Click Add Feedback button on the Solution Details page.

This example illustrates the Solution Feedback modal window.

The screenshot shows a modal window titled "Solution Feedback" with a close button (X) in the top right corner. A "Help" link is also present in the top right. The main content area contains a text box with the instruction: "Select a feedback type and provide a description. Select Done to Submit the feedback, you will not be able to see the feedback once its submitted." Below this, there are two mandatory fields: "*Type" with a dropdown menu showing "Improvement Needed" and a downward arrow, and "*Description" with a large text input area. At the bottom of the modal, there are two buttons: "Done" and "Cancel".

<i>Field or Control</i>	<i>Description</i>
Type	Select the feedback type. You can configure the required feed back types in the Feedback Type page. For details, see “Feedback Type Page” (PeopleSoft Services Foundation)
Description	Meaningful description of the feedback.

Note: ‘Type’ and ‘Description’ are mandatory fields.

Using the PeopleSoft Fluid Interface to View Cases

Employees use the My Cases tile to access the My Cases page.

Pages Used to View Cases

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>My Cases Tile</u>	CR_RC_CASE_SS_SRCH_FL_GBL	Use My Cases tile to access My Cases page.

Page Name	Definition Name	Usage
<u>My Cases Page</u>	RC_CASE_SS_SRCH_FL	Use My Cases page to view a list of cases that are currently associated with the logged in employee

My Cases Tile

Use the My Cases tile to access the My Cases page..

Navigation:

Click the HR Service Center tile available in the Employee Self Service home page. The My Cases tile is available on the HR Service Center dashboard.

This example illustrates the My Cases tile for the tablet.



This example illustrates the My Cases tile for the smartphone.



The tile displays number of open cases.

My Cases Page

Select the reason for adding the interested party, and click the Save button to add an interested party to the case.

The predefined searches available are:

- All known issues that I am interested in

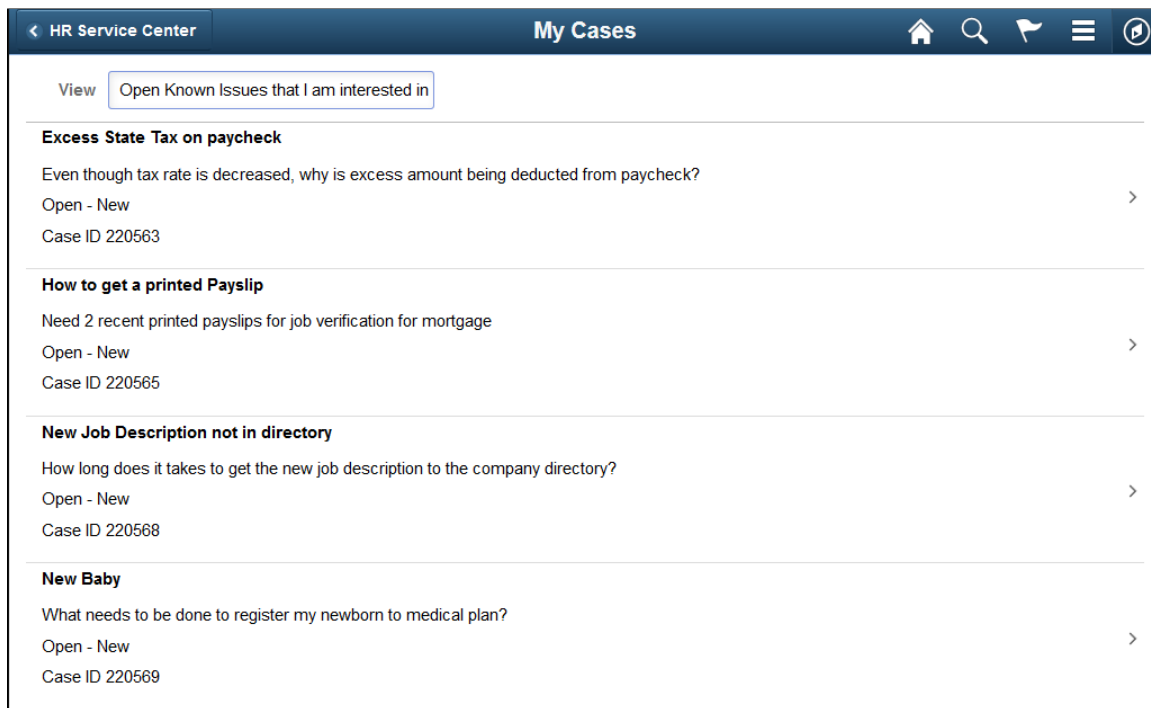
- All cases that I am the contact for
- All my cases
- All my cases related to Program/Service
- All my open cases
- Cases that I reported for others
- Open known issues that I am interested in
- Open cases that I am the contact for
- Open cases that I reported for others
- Open cases that I reported for myself

Navigation:

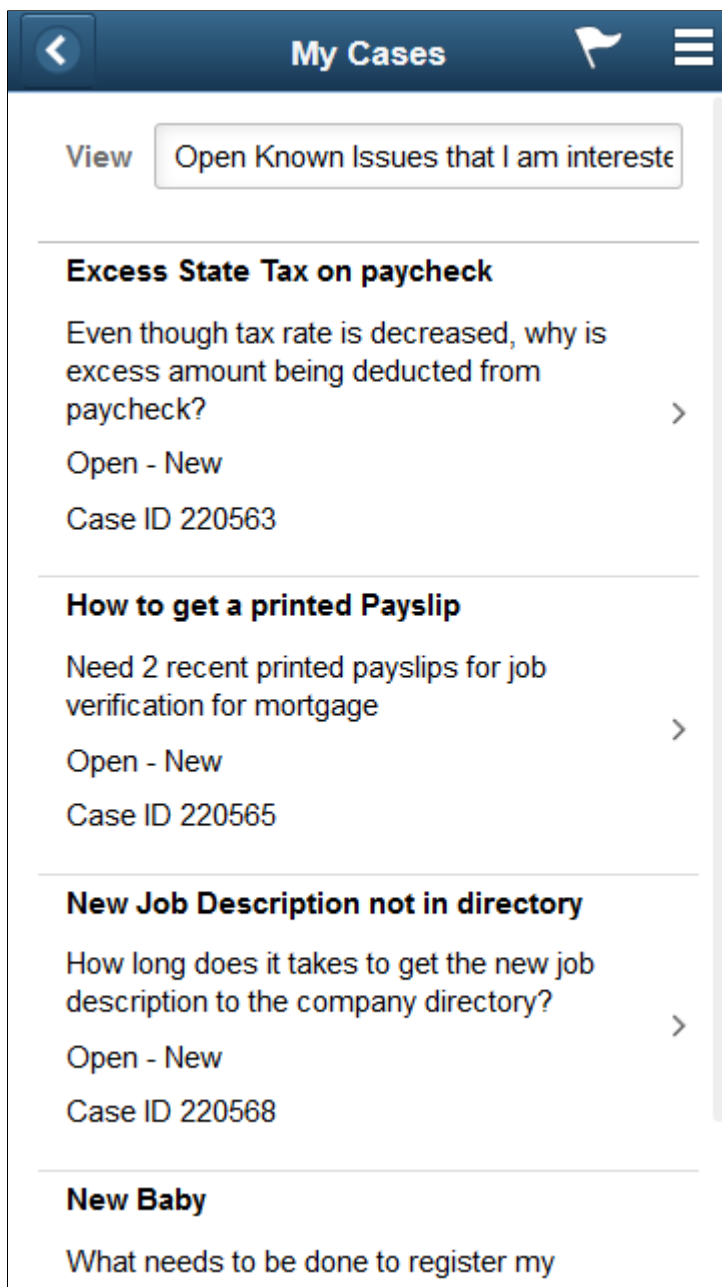
- Click the My Cases tile available on the HR Service Center dashboard.
- Click the My Cases button available on the Case Submitted page.

Note: "Open cases that I reported for myself" is the default view when the employee clicks on the My Cases tile and is taken to the corresponding page.

This example illustrates the fields and controls on the My Cases page for the tablet.



This example illustrates the fields and controls on the My Cases page for the smartphone.



Clicking the case summary transfers the user to view the case details and make updates, such as adding notes and attachments, reopen the case or close the case if the user no longer requires help.

Case Details Page

Use the Case Details page displays the case details such as case category, status, summary, description, and priority. This page is also the starting point for several other processes: adding notes, changing contact information, requesting that an agent contact the user, reopening a case, and viewing solutions that are already under consideration for this case. An administrator can decide which all processes need to be delivered based on the Display Template (CRM_HHD_MCASE_FL) set up.

Navigation:

- On the HR Service Center home page, click a case in the My Cases page.
- Select a case from the list of search results on the My Cases page.

This example illustrates the fields and controls on the Case Details page for the tablet.

Case Details

This is a benefits case
 Open - Reopened
 Case ID 220846

Close Case

Notes & Solutions | Details | Contact

Add Note

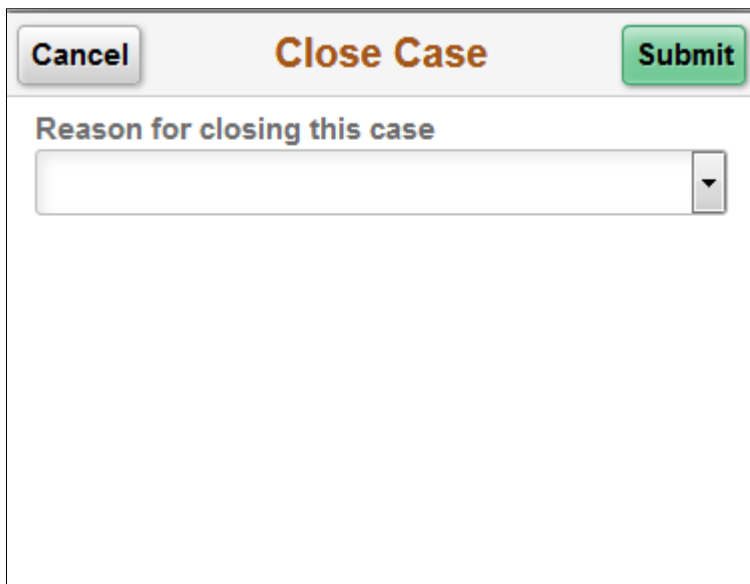
Note 16 Jun 2016 at 7:59 AM
 By Claudia Salinger
 Problem Re-Occurred
 Problem Re-Occurred

Note 16 Jun 2016 at 7:31 AM
 By Claudia Salinger
 Problem Re-Occurred
 Problem Re-Occurred

Solution 16 Jun 2016 at 7:30 AM
 By Claudia Salinger
 Case Resolved in Self-Service
 Case Resolved in Self-Service
 Failed Resolution

Field or Control	Description
Notify Agent	Click this button to send appropriate notification to agents. PeopleSoft delivers AAF objects (trigger points, action types, and terms) to support this process. The delivered AAF objects send notifications to the assignee (agent, provider group, or call center manager). Separate email and work list notifications enable the system to send notifications using the recipient's preferred notification method. By default, this button is hidden by means of display template.
Close Case	Click the Close Case button to close a case at any time. This button is available only if the business unit rules permit self-service users to close cases. On clicking this button, user is presented with a Close Case modal window (RC_SS_CLOSECASE_FL)

This example illustrates the fields and controls on the Close Case modal window.

A screenshot of the 'Close Case' modal window. At the top, there is a header bar with three buttons: 'Cancel' (grey), 'Close Case' (orange text), and 'Submit' (green). Below the header, the label 'Reason for closing this case' is positioned above a large, empty text input field. To the right of the input field is a small downward-pointing arrow icon, indicating a drop-down menu.

<i>Field or Control</i>	<i>Description</i>
Reason for closing this case	Select one of the predefined reasons for closing the case from the drop-down list box. The available reasons include the following: • Case Cancelled • Case Resolved • Duplicate Case • Other If the user wants to enter a free-form text reason, select 'Other', and enter the reason in the Details field.

Field or Control	Description
Submit	Click this button to close the case. When the user clicks this button, the system changes the case status to the value that is specified in the Closed Case Status field on the Case Details page. If a user selects any value other than 'Other', the system resolves the case by using the solution that is identified on the Reason and Solution Link page. If no solution is linked to the selected reason code, the system creates one (using the solution type Canned) and updates the Reason and Solution Link page accordingly. If a user entered a reason in the Details field, the system uses the text to create a new solution of type Adhoc. The solution then resolves the case using the newly created solution. When the case gets closed, the solution associated with the reason selected by the employee is saved as the solution that resolved the case. For more details on this, see Association of Solutions with Case Closure Reasons.
Reopen Case	Click the Reopen Case button to reopen cases that are closed. User is allowed to reopen a case based on configuration settings. If user is not allowed to reopen case, then the Reopen Case button is not displayed in the Case Details page. On clicking this button, user is presented with a Reopen Case modal window (RC_SS_REOPEN_SCF).

This example illustrates the fields and controls on the Reopen Case modal window.

The screenshot shows a modal window titled "Reopen Case". At the top, there are three buttons: "Cancel" (grey), "Reopen Case" (orange), and "Submit" (green). Below the buttons, there is a label "Reason for Reopening the Case" in blue. Underneath the label is a text input field with a small downward-pointing arrow on the right side, indicating a dropdown menu.

Field or Control	Description
Reason for reopening the case	Select one of the predefined reasons for reopening the case from the drop-down list box. The available reasons include the following: • Problem Re-occurred • Resolution Failed • Other If the user wants to enter a free-form text reason, select 'Other', and enter the reason in the Details field.
Submit	Click this button to reopen the case. When the user clicks this button, the system changes the case status to the value that is specified in the Reopen Case Status field on the Case Details page.

Case Details Page: Notes and Solutions Tab

Use Case Details page: Notes and Solutions tab (RC_SS_UPDATES_FL) to view the most recent Notes and Solutions added to the case by the agent or employee (or an eligible case contact). User can view the solution summary, description, and status. User can add a Note or select a view that shows only notes, solutions or both. It is also possible to attach one or more files to the note.

Navigation:

On the Case Details page, click the Notes and Solutions tab.

This example illustrates the fields and controls on the Case Details Page: Notes and Solutions tab for the tablet.

My Cases

Case Details



This is a benefits case

Open - Reopened

Case ID 220846

Close Case

Notes & Solutions

Details

Contact



Add Note

 Note

16 Jun 2016 at 7:59 AM

By Claudia Salinger

Problem Re-Occurred

Problem Re-Occurred

 Note

16 Jun 2016 at 7:31 AM

By Claudia Salinger

Problem Re-Occurred

Problem Re-Occurred

 Solution

16 Jun 2016 at 7:30 AM

By Claudia Salinger

[Case Resolved in Self-Service](#)

Case Resolved in Self-Service

 Failed Resolution

This example illustrates the fields and controls on the Case Details Page: Notes and Solutions for the smartphone.

Note: For smartphones, Notes and Solutions, Details, and Contact details are available by selecting the corresponding value from the View field.

Click the solution summary to view the details corresponding to that solution. User is also provided with an option to email the solution to themselves or others; and can view how many people find this solution as helpful.

Field or Control	Description
Add Note	Click the Add Note button to add a new case note and attachment. On clicking this button, user is presented with a modal window (RC_SS_NOTE_ADD_SCF).

This example illustrates the fields and controls on the Add Note modal window.

<i>Field or Control</i>	<i>Description</i>
Add Attachments	Click this button to select a file to add as an attachment to the note.

Case Details Page: Details Tab

Use Case Details page: Details tab (RC_SS_DETAILS_FL) to view the case details such as category, status, summary, and the like.

Navigation:

On the Case Details page, click the Details tab.

This example illustrates the fields and controls on the Case Details page: Details tab for the tablet.

My Cases

Case Details



This is a benefits case
Closed - Resolved
Case ID 220846

Close Case

Notes & Solutions

Details

Contact

Category Details

Category

Benefits

Type

All Benefits

Detail

Benefit Change

Case Details

Status

Closed - Resolved

Summary

This is a benefits case

Description

This is a benefits case.
Added on 16/06/2016

Priority

High

Created For

Claudia Salinger

Reported By

Claudia Salinger

Date Created

06/15/2016 11:32PM

Date Closed

06/16/2016 11:53PM

This example illustrates the fields and controls on the Case Details page: Details for the smartphone.

The screenshot shows a mobile application interface for 'Case Details'. At the top is a dark blue header with a back arrow on the left, the title 'Case Details' in the center, and a hamburger menu icon on the right. Below the header, the main content area has a light gray background. It starts with the text 'This is a benefits case' in bold, followed by 'Open - Reopened' and 'Case ID 220846'. A horizontal line separates this from a 'View' section containing a single button labeled 'Details'. Another horizontal line follows, leading to a section titled 'Category Details' in bold. This section contains three rows of information: 'Category Benefits', 'Type All Benefits', and 'Detail Benefit Change'. A mouse cursor is visible over the 'All Benefits' text. Below this is a section titled 'Case Details' in bold, which contains one row: 'Status Open - Reopened'. At the bottom of the screen is a light gray bar with a button labeled 'Close Case'.

Case Details Page: Contact tab

Use the Case Details Page: Contact tab (RC_SS_CONTACT_FL) to view the contact person for the particular case and allows the employee to edit the case contact. User can add or remove interested parties to their case. The tab also displays the interested parties added by the user or agent.

Navigation:

On the Case Details page, click the Contact tab.

This example illustrates the fields and controls on the Case Details Page: Contact tab for the tablet.

Case Details

My Cases

Test only
Open - Reopened
Case ID 220718

Close Case

Notes & Solutions Details **Contact**

Case Contact

Name Carolyn Blum
Address PO Box 567, Pleasanton, CA, 94545, USA

Interested Parties

Name	Reason
Stephen Ray	HR Manager

This example illustrates the fields and controls on the Case Details Page: Contact for the smartphone

Case Details

This is a benefits case
Open - Reopened
Case ID 220846

View Contact

Case Contact

Name Patrick Brian
Address weewe

Interested Parties

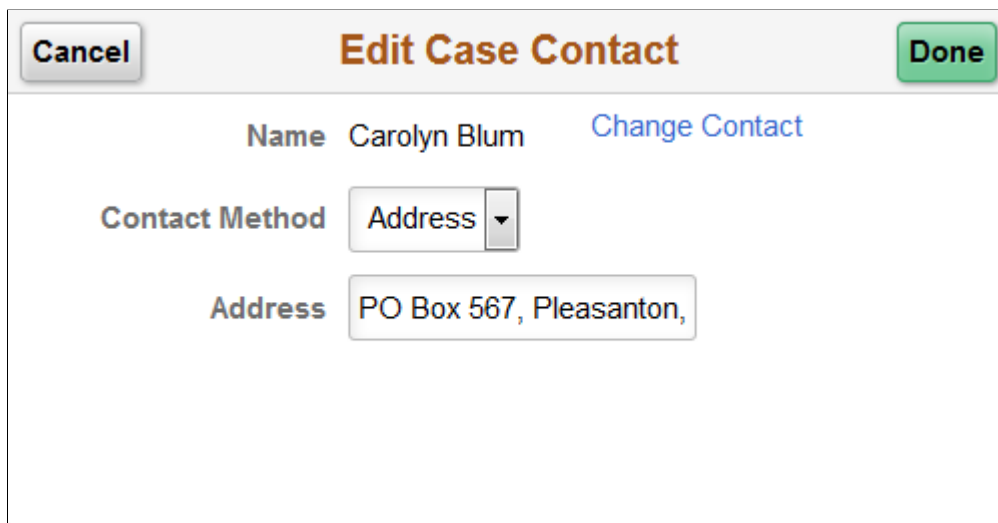
No interested parties added to this case.

Add Interested Party

Close Case

Field or Control	Description
	Click this button to go to the Edit Case Contact modal window (RC_SS_HD_CNTC_SCF), wherein user can change the contact details such as phone number, email, or address specified for a case. You can also select another employee as case contact and modify their contact details.

This example illustrates the fields and controls on the Edit Case Contact modal window.



You can change contact information when you are creating a new case or viewing an existing case.

On the Create Case page, the Change Contact link is available only until the case is submitted. After submitting the case, use the Edit Case Details Page to change the contact information.

Click the Add Interested Party button to select the employee and go to the Add Interested Party modal window (RC_SS_INTPARTY_SCF).

This example illustrates the fields and controls on the Edit Case Contact modal window.



Select the reason for adding the interested party, and click the Save button to add an interested party to the case.

Using PeopleSoft Fluid User Interface to View Known Issues

Employees use the Known Issues tile to access the Known Issues page.

Pages Used to View Known Issues

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
Known Issues Tile	CR_RC_SS_ISSUES_FL_GBL	Use Known Issues tile to access Known Issues page to view a list of all known issues.
Known Issues Page	RC_SS_ISSUES_FL	Use the Known Issues page to view a list of all global cases set by the administrator.

Known Issues Tile

Use the Known Issues tile to access Known Issues page.

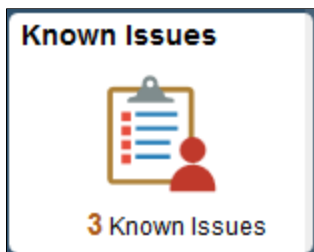
Navigation:

- Click the HR Service Center tile available in the Employee Self Service home page. The Known Issues tile is available on the HR Service Center dashboard.
- Known Issues can also be accessed as part of Search for Answers.

This example illustrates the Known Issues tile for the tablet.



This example illustrates the Known Issues tile for the smartphone.



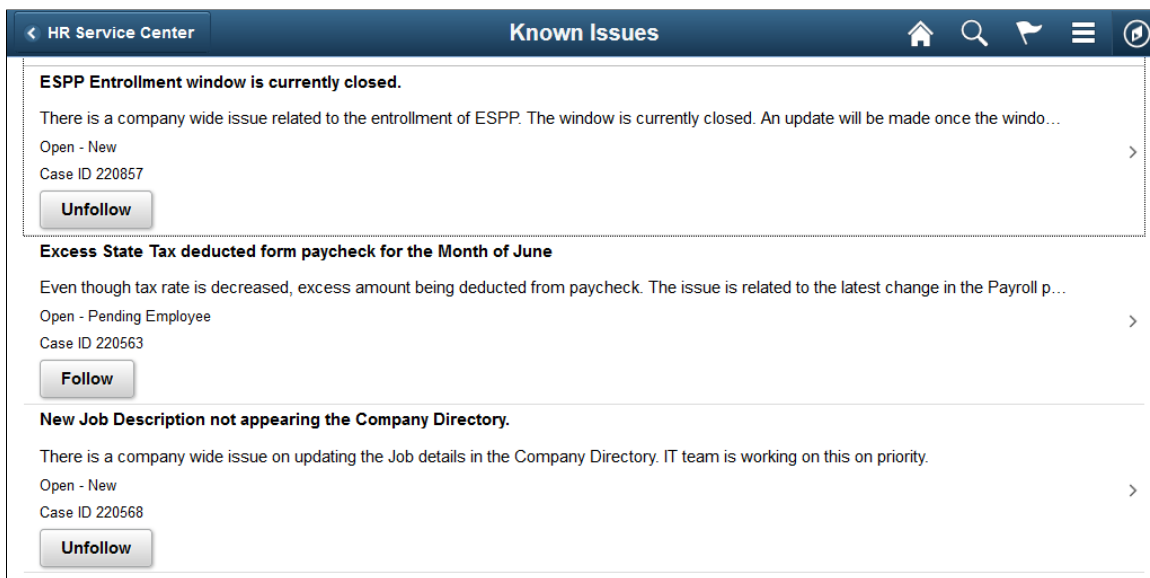
Known Issues Page

Use the Known Issues page to view a list of all global cases set by the administrator. Global cases are cases that impact multiple users and have been marked as Global. The look and feel of this page are configured by the administrator using display template (CRM_HHD_KNWN_ISSUES_FL).

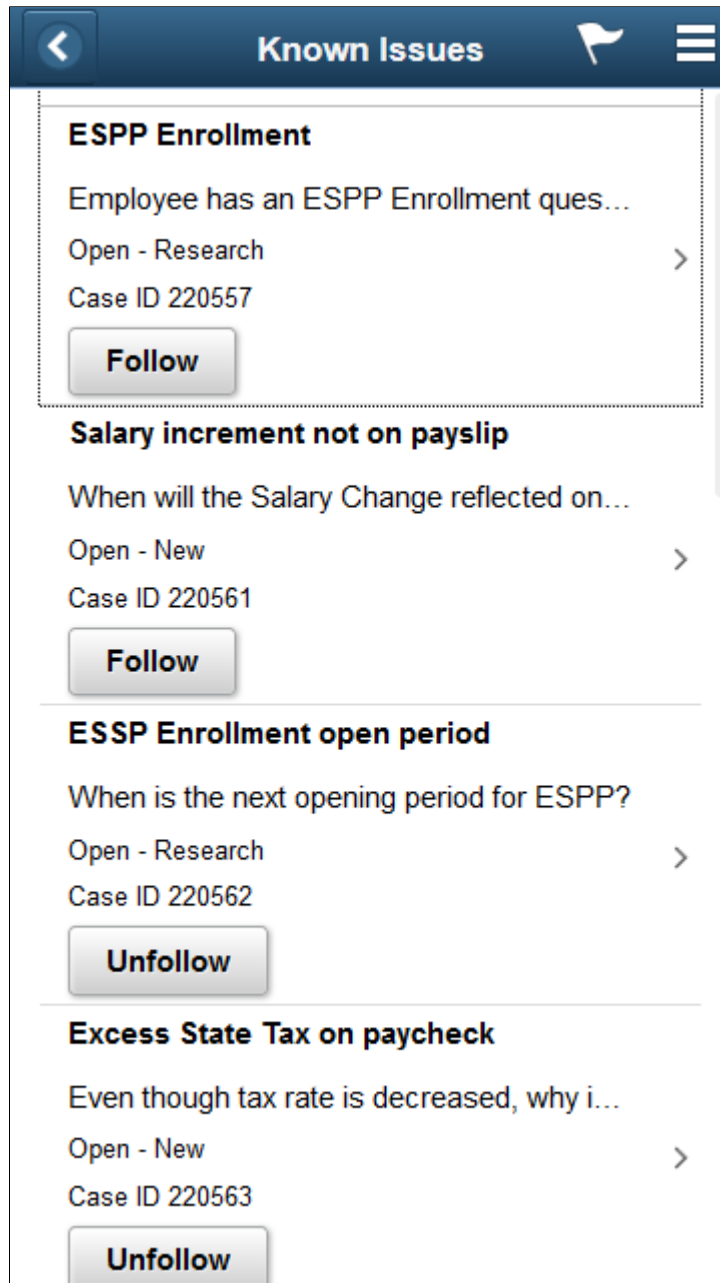
Navigation:

Click the Known Issues tile to access the Known Issues page.

This example illustrates the fields and controls on the Known Issues page for the tablet.



This example illustrates the fields and controls on the Known Issues page for the smartphone.



<i>Field or Control</i>	<i>Description</i>
Follow and Unfollow buttons	Use these buttons for a case to receive notifications about the case progress, without going into details.

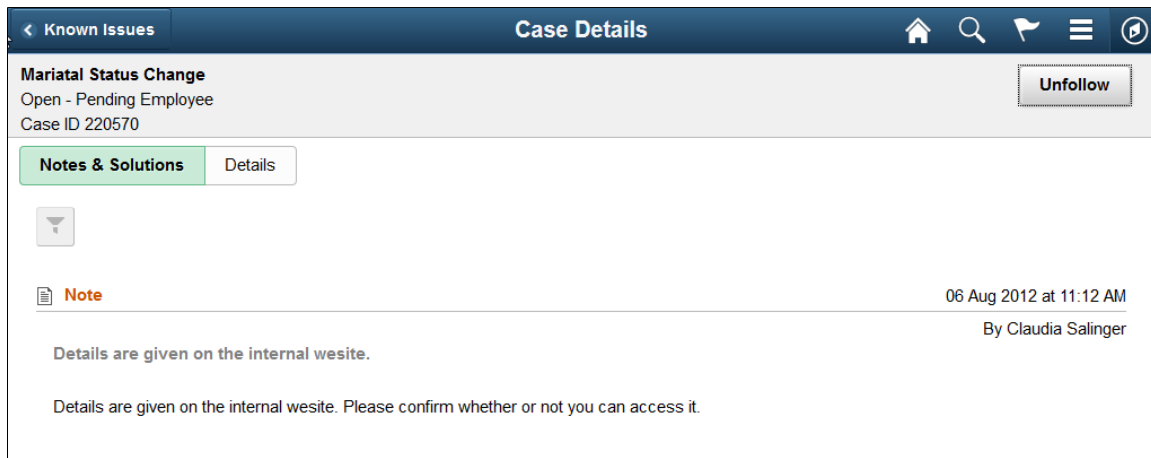
Known Issues: Case Details Page

User can view the details of a case such as latest notes and attachments linked to the known issue and other details such as summary, priority, agent to which the case is assigned, and the like.

Navigation:

Click a known issue link to access Known Issues: Case Details page.

This example illustrates the fields and controls on the Known Issues page for the smartphone.



Note: Contact tab is not available for an employee while viewing case details for known issues. Also, by default, Add Note button is disabled for known issues and can be enabled by means of Display Template.

This example illustrates the fields and controls on the Known Issues page for the smartphone.

<i>Field or Control</i>	<i>Description</i>
Follow and Unfollow buttons	Use these buttons for a case to receive notifications about the case progress.

Using the PeopleSoft Fluid User Interface to View HR Shortcuts

Employees use the HR Shortcuts tile to access the HR Shortcuts page.

Pages Used to View HR Shortcuts

Page Name	Definition Name	Usage
<u>HR Shortcuts Tile</u>	CR_RC_SS_HR_SHORTS_FL_GBL	Use the HR Shortcuts tile to access the HR Shortcuts page to view links to commonly used components in HCM.
<u>HR Shortcuts Page</u>	PT_AGSTARTPAGE_NUI	Use the HR Shortcuts page to view links to commonly used components in HCM.

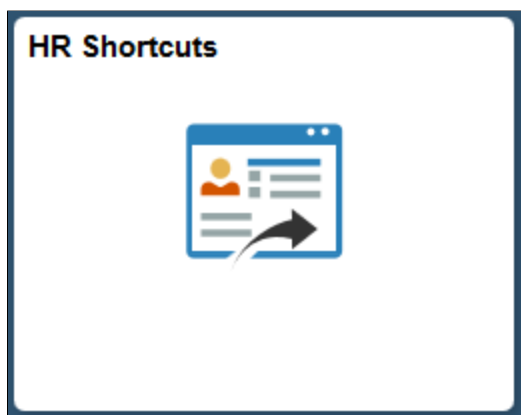
HR Shortcuts Tile

use the HR Shortcuts tile to access the HR Shortcuts page.

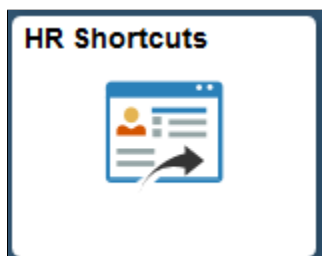
Navigation:

Click the HR Service Center tile available in the Employee Self Service home page. The HR Shortcuts tile is available on the HR Service Center dashboard.

use the HR Shortcuts tile to access the HR Shortcuts page.



This example illustrates the HR Shortcuts tile for the smartphone.



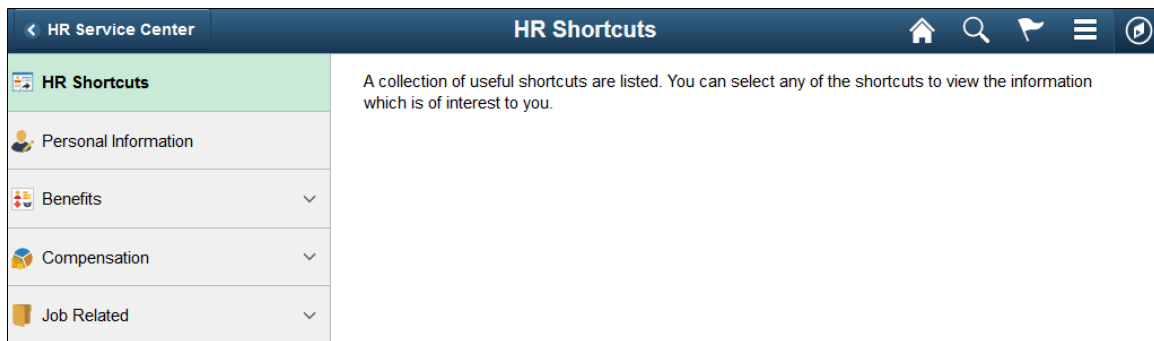
HR Shortcuts Page

Use the HR Shortcuts page to view links to commonly used components in HCM. For details on this, refer PeopleSoft HCM.

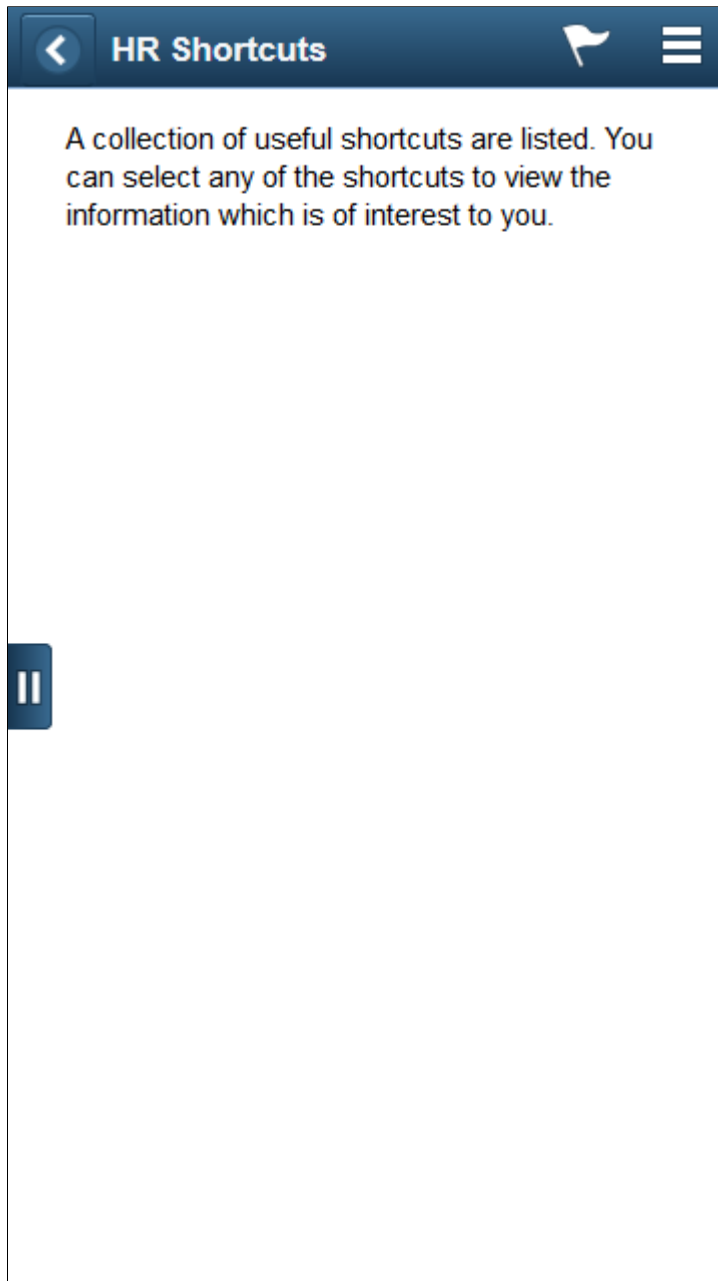
Navigation:

Click the HR Shortcuts tile to access the HR Shortcuts page.

This example illustrates the fields and controls on the HR Shortcuts page for the tablet.



This example illustrates the HR Shortcuts page for the smartphone.



The following table lists the category, action, and corresponding description of links on the HR Shortcuts page.

Category	Action	Description
Personal Information	Personal Information	Used to view and update an employee's personal information.

Category	Action	Description
Job Related	Company Directory	Used to access employees company directory and matrix teams that you viewed in the classic Org Chart Viewer feature.
Job Related	Absence Request	Used to select the absence request to approve or deny.
Job Related	Performance Documents	Used to access employee's performance information.
Job Related	Timesheet	Used to approve or deny an employee's reported time. The format of the timesheet depends on whether the employee is an elapsed or punch time reporter.
Job Related	Talent Profile	Used to view and edit employee's talent profiles and create new profiles.
Compensation	View Paycheck	Used to view details of the employee's paycheck.
Compensation	Compensation History	Used to review or verify an employee's compensation history.
Benefits	Benefits Summary	Used to view summary information about current benefits of the employee.

Using the PeopleSoft Fluid User Interface to Browse for Solutions By Topic

This topic discusses how employees use the PeopleSoft Fluid User Interface to browse for solutions by topic.

Pages Used to Browse for Solutions By Topic in the PeopleSoft Fluid User Interface

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Browse By Topic Tile</u>	CR_RC_SS_BROWSE_TL_FL_GBL	Allow employees to quickly browse for solutions by topics which are displayed as links on the tile. The tile displays a maximum of 11 topics which the users can set up, to facilitate their search for relevant solutions.
<u>Search Results Page</u>	RC_SS_SRCH_ANS_FL	View the content corresponding to the topic link selected on the Browse By Topic tile.

Browse By Topic Tile

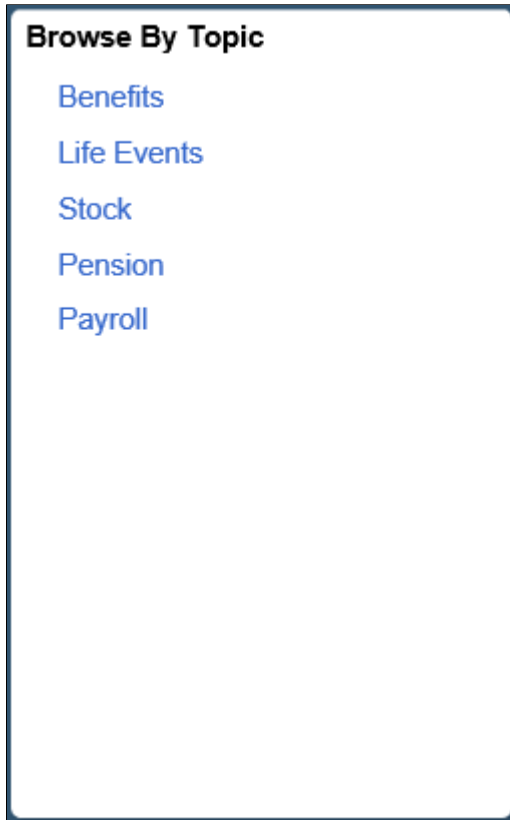
Employees use the Browse By Topic tile (CR_RC_SS_BROWSE_TL_FL_GBL) to quickly browse for solutions by topics which are displayed as links on the tile. The tile displays a maximum of 11 topics which the users can set up, to facilitate their search for relevant solutions.

For more information on how to set up the topic links on the Browse By topic tile, refer [Home Page - Fluid Preferences Page](#).

Navigation:

By default, the Browse By Topic tile is not available in the HR Service Center dashboard. You can add the Browse By Topic tile, through personalization, to any system-delivered homepage or a homepage that you create.

This example illustrates the fields and controls on the Browse By Topic tile.



Related Links

[Defining the Self-Service Home Page Content and Layout](#)

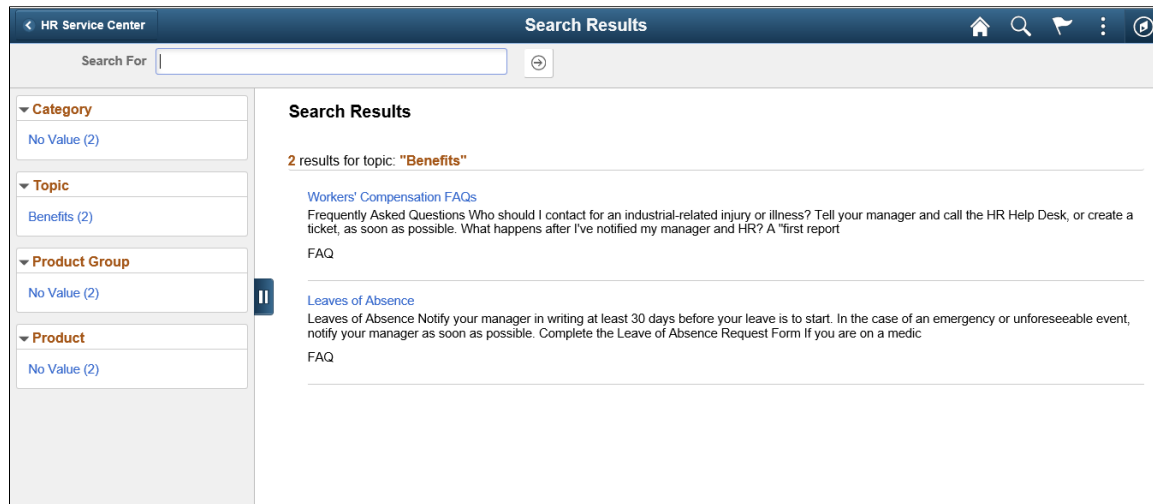
Search Results Page

Use the Search Results page (RC_SS_SRCH_ANS_FL) to view the content corresponding to the topic link selected on the Browse By Topic tile.

Navigation:

Click a topic link on the Browse By Topic tile to view the Search Results page.

This example illustrates the fields and controls on the Search Results page.



Understanding HR HelpDesk Self Service and HCM Integration

This feature provides the ability to integrate and configure contextual HR HelpDesk specific content on PeopleSoft Fluid HCM Self-service pages. As part of integration, administrators need to setup integration between HCM and CRM nodes and enable “Find Help” Related Content service on certain HCM fluid pages as per business needs. Wherever enabled, each of those related content services can be further configured using newly delivered setup pages in CRM to define context based setup configurations. In run time, Employees can click on Find help related content tile on a HCM transaction page, and search as well as view solutions which are contextually recommended and report HR helpdesk cases in CRM.

This topic discusses:

- HR HelpDesk Self Service Integration Setup in CRM
- Enabling Related Content Tiles for HCM Self Service Transactions

Setting up PeopleSoft HR HelpDesk Self Service Integration in CRM

This section discusses the set up pages in CRM, for HR HelpDesk self-service integration with HCM.

Pages Used for Setting up HR HelpDesk Self Service Integration in CRM

Page Name	Definition Name	Usage
<u>Action Configuration Page</u>	RC_CTXT_CONFIGACTN	To define actions that can be performed in a context like Solution Recommendation, Case Creation etc.

Page Name	Definition Name	Usage
<u>Context Map Definition Page</u>	RC_CNTXT_ACTN_MAP	To define actions applicable for a context. These actions are referred from Action Configuration Page.
<u>HR HelpDesk Context Parameters Page: Solutions tab</u>	RC_CNTXT_MAP_SOL	To configure the context related HR HelpDesk parameters in CRM side. HR HelpDesk administrator can setup preferences for solution parameters that are used for solution recommendations.
<u>HR HelpDesk Context Parameters Page: Case tab</u>	RC_CNTXT_CASE	To define case parameters.
<u>HR HelpDesk Context Parameters Page: Preferences tab</u>	RC_CNTXT_SOL_PREF	To setup preferences for case parameters.

Action Configuration Page

Use the Action Configuration page (RC_CTXT_CONFIGACTN) to define actions that can be performed in a context..

HR HelpDesk Administrator should be able to configure actions for Solution recommendation, Case creation by associating appropriate Application Package. These packages will be used to implement the logic/execution for solution recommendations, Case creation, chat based on user Profile and HCM context in CRM.

Navigation:

Setup CRM > Product Related > Call Center > Self-Service Configuration > HCM Self-Service Integration > Define Self Service Action

This example illustrates the fields and controls on the Action Configuration page.

Define Action

Action Code: CASE

Action Details

Name

Description

Action Definition

Package

Path

Class

Created

By

Modified 01/25/2018 6:31AM PST

By

VP1

Stu Marx

Field or Control	Description
Package, Path, and Class	The implementation logic for execution of Solution Recommendations, Case Creation, based on user Profile and HCM context in CRM. The administrator can override this logic by associating appropriate application packages, based on requirements. The application packages are associated with each Action Code on CRM which will be delivered as system data.

Context Map Definition Page

Use the Context Map Definition page (RC_CNTXT_ACTN_MAP) to define actions applicable for a context. These actions are referred from Action Configuration page.

Navigation:

Setup CRM > Product Related > Call Centre > Self-Service Configuration > HCM Self-Service Integration > Configure Context

This example illustrates the fields and controls on the Context Map Definition page.

Context Map Definition

Context Map CodeCASE

Map Definition

Description

Linked Actions

1-1 of 1

Action Code	Name		
		+	-

Created

By

Modified

By

Save

Notify

Add

Update/Display

Administrator can set up the solutions that need to be returned contextually for the corresponding HCM transaction. It is also possible to add solutions as Featured Solutions.

Field or Control	Description
Set ID and Library ID	Select an appropriate Set ID and Library ID to which you wish to associate the solution.
Order	Sequence in which featured solutions appeared on the Find Help page.

HR HelpDesk Context Parameters Page: Solutions tab

Use the HR HelpDesk Context Parameters Page (RC_CNTXT_MAP_SOL) to configure the context related HR HelpDesk parameters in CRM side.

HR HelpDesk administrator can setup preferences for solution parameters that are used for solution recommendations.

Navigation:

Setup CRM > Product Related > Call Centre > Self-Service Configuration > HCM Self-Service Integration > Configure Context

This example illustrates the fields and controls on the HR HelpDesk Context Parameters Page : Solutions tab (1 of 2).

This example illustrates the fields and controls on the HR HelpDesk Context Parameters Page : Solutions tab.

Administrator can set up the solutions that need to be returned contextually for the corresponding HCM transaction. It is also possible to add solutions as Featured Solutions.

Field or Control	Description
Set ID and Library ID	Select an appropriate Set ID and Library ID to which you wish to associate the solution.
Order	Sequence in which featured solutions appeared on the Find Help page.

HR HelpDesk Context Parameters Page: Case tab

Use HR HelpDesk Context Parameters Page: Case tab (RC_CNTXT_CASE) to define Case parameters. HR HelpDesk administrator can define map of Case BUs with a set of Quick Codes or Category/Type/Details in CRM which will be used to populate case defaults, when an employee begins to create a case from HCM.

Navigation:

Setup CRM > Product Related > Call Centre > Self-Service Configuration > HCM Self-Service Integration > Configure Context > Case tab

This example illustrates the fields and controls on the HR HelpDesk Context Parameters Page: Case tab.

HRHD Context Parameters

[New Window](#) |
 [Personalize Page](#) |
 [Help](#)

Solutions |
 Case |
 Preferences

Display Template Family Code	CRM_HHD
Context Map Code	BENEFITS Benefits - Life Events

Mapped Case Parameters

1-1 of 1

Business Unit	Quick Code	Description	Category	Specialty Type	Detail		
						+	-

Created	By
Modified	By

Save

[Solutions](#) |
 [Case](#) |
 [Preferences](#)

<i>Field or Control</i>	<i>Description</i>
Business Unit	Select an appropriate case business unit.
Quick Code	Select an appropriate quick code to define map of Case business units.

Note: It is permissible to define case parameters by either Quick Code (if it has CTD details) or CTD values directly in case there are no respective Quick Codes.

HR HelpDesk Context Parameters Page: Preferences tab

Use Configure Context Page: Preferences tab (RC_CNTXT_SOL_PREF) to setup preferences for case parameters.

Navigation:

Setup CRM > Product Related > Call Centre > Self-Service Configuration > HCM Self-Service Integration > Configure Context > Preferences tab

This example illustrates the fields and controls on the HR HelpDesk Context Parameters Page: Preferences tab.

HRHD Context Parameters

Solutions

Case

Preferences

Display Template Family Code

CRM_HHD

Context Map Code

BENEFITS

Benefits - Life Events

Preferences

Include Knowledge Content

☒ Featured Solution

☒ Frequently Asked Questions

☒ Known Issues

☒ Top Solution

Maximum count of solutions

Order By

This example illustrates the fields and controls on the HR HelpDesk Context Parameters Page: Preferences tab.

Created

By

Modified

By

Save

Add

Update/Display

Solutions

Case

Preferences

Field or Control	Description
Include Knowledge Content	Select the content(s) that need to be displayed in Find Help page.
Maximum count of solutions	Specify the count of maximum solutions that need to be in Find Help page.
Order By	Select the filter criteria based on which solutions are displayed in Find Help page. You can filter the solutions based on last updated date, solved count, or usage count.

Enabling Related Content Tiles for HCM Self Service Transactions

To enable related content tiles on any HCM self-service transaction, perform the following:

1. Navigate to **Human Resources > PeopleTools > Portal > Related Content Service > Manage Related Content Service**.
2. Select the required content reference.
3. Add the two related content services as per requirement: HR_RC_FIND_HELP and HR_RC_MYCASE.
4. Click on Configure button.
5. Specify the CRM Context ID and Action Code in the Mapping Data field. Action Code is optional for My Cases.
6. Specify the Service Filter parameters as below:

Package: PS_RC_CRM_RELC_FILTER

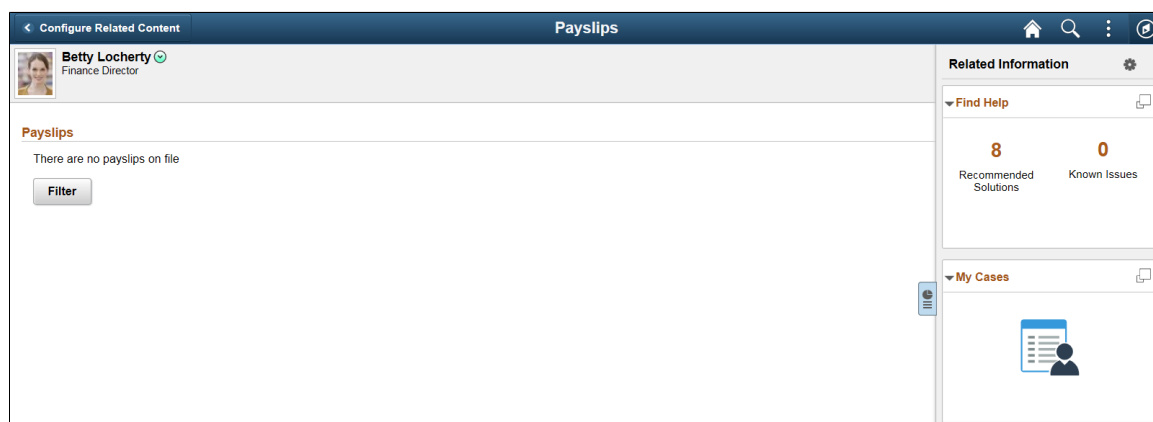
Path: :

Class ID: CRMRelatedContent

7. Select Security Options and Click Ok.
8. Save the details configured in Assign Related Actions page.

After configuring related content tiles on a HCM transaction, the page is displayed as shown (Payslips page is illustrated in this scenario)

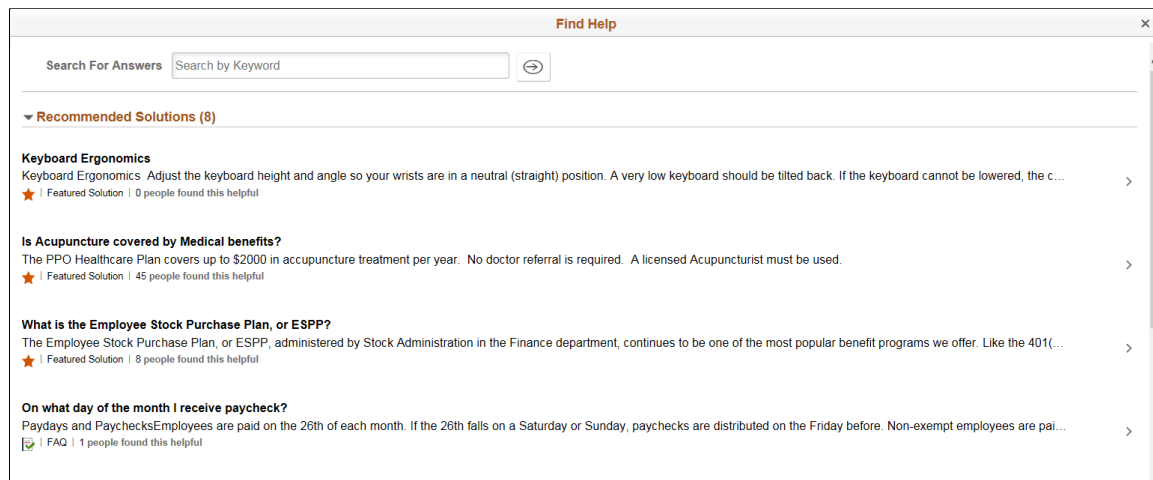
This example illustrates the Payslips page.



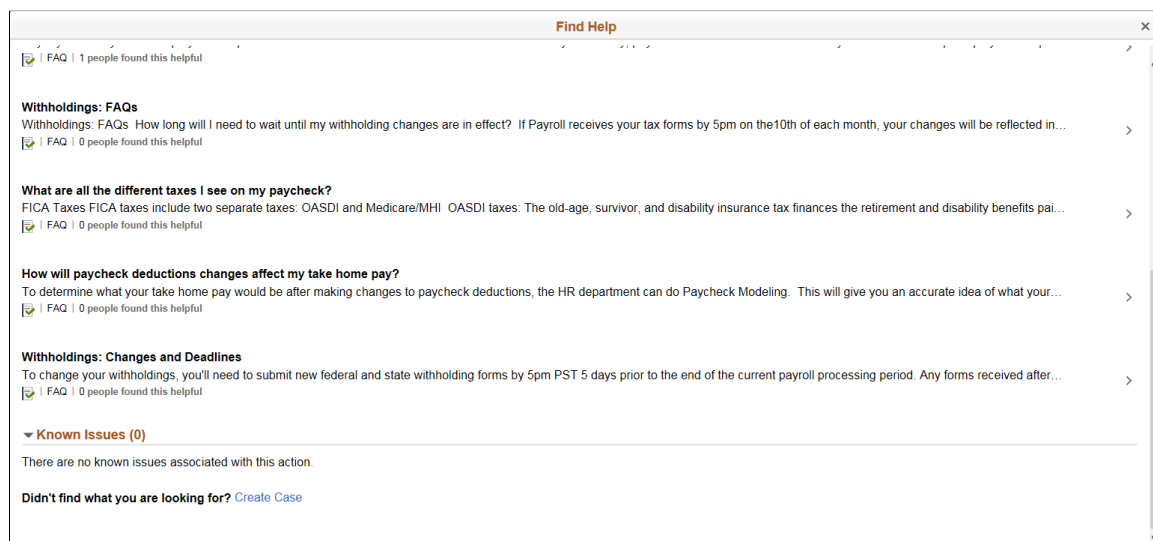
The Find Help tile displays the count of recommended solutions or known issues.

Click on the Zoom icon, displays a modal window as shown:

This example illustrates the Find Help page.



This example illustrates the Find Help page.



You can view featured solutions first followed by known issues. If you want to create a case, click on Create Case link.

Click on the Search icon, after entering the required keywords in Search for Answers field. Search results are displayed in the Search Results page.

The My Cases tile displays the count of case(s) along with the case status, created specific to the HCM transaction for the logged in user.

Click on the Zoom icon, to view the My Cases page. For details, see [Using the PeopleSoft Fluid Interface to View Cases](#)

Note: User roles assigned with the permission list HCCPCRMSFL can only view the Find Help and My Cases related content tile.

Understanding Chat Feature on Fluid HR Helpdesk Components

The Classic HR HelpDesk provides employees with the option to initiate chat with available agents to get their HR requests/queries answered. This option also available for Fluid Self-service pages in HR Helpdesk. For details on the chat feature available on the classic pages, see “Setting Up Chat Options” (PeopleSoft Multichannel Applications)

This topic discusses:

- Configurations to enable chat on fluid pages
- Steps to assign related content service on fluid components

Setting up Chat Options on Fluid Pages

PeopleSoft CRM facilitates to enable chat with agent as a related content service on Fluid Employee Self-service pages. This feature is available from People Tools version 8.55 and above and CRM 9.2.

Pages Used to Set up Chat Options on Fluid Pages

<i>Page Name</i>	<i>Definition Name</i>	<i>Usage</i>
<u>Chat Enabled Fluid Page Setup</u>	RB_CHAT_ENABL_F	To specify the chat profile and agent pop-up page for each fluid self-service component to support the chat feature.
<u>Agent Popup Page Definition Page</u>	RB_CHAT_FL_POPUP	To define the mapping between fluid self-service components and full-functional page setup.

Chat Enabled Fluid Page Setup

Use the Chat Enabled Fluid Page Setup (RB_CHAT_ENABL_F) to specify the chat profile and agent pop-up page for each self-service component to support the chat feature.

Navigation:

Set Up CRM > Product Related > Multichannel Definitions > Chat > Fluid Setup > Chat Page Setup - Fluid

This example illustrates the fields and controls on the Chat Enabled Fluid Page setup.

Chat Enabled Fluid Page setup

Chat Enabled Self-Service Components Personalize | Find | | First 1-8 of 8 Last

	Enable Chat Automation	Component Name	Chat Profile Name	Chat Profile	Agent Popup Page ID	Agent Popup	
1	☒	RC_CASE_SS_SRCH_FL	Chat Demo2	Chat Profile	MiniNav	Agent Popup	
2	☒	RC_SS_CCASE_FL	CHAT_DEMO	Chat Profile	MiniNav	Agent Popup	
3	☒	RC_SS_FAQ_FL	CHAT_DEMO	Chat Profile	360DWW	Agent Popup	
4	☒	RC_SS_ISSUES_FL	CHAT_DEMO	Chat Profile	360DWW	Agent Popup	
5	☒	RC_SS_MCASE_HHD_FL	Chat Demo2	Chat Profile	CaseHRHD	Agent Popup	
6	☒	RC_SS_SOLN_DTL_FL	CHAT_DEMO	Chat Profile	Solution	Agent Popup	
7	☒	RC_SS_SRCH_FL	CHAT_DEMO	Chat Profile	MiniNav	Agent Popup	
8	☒	RC_SS_TOPSOLN_FL	CHAT_DEMO	Chat Profile	360DWW	Agent Popup	

Save

Field or Control	Description
Enable Chat Automation	Select to activate the corresponding fluid component for users to start live chat.
Component Name	Select the fluid component for which the chat feature has to be enabled.
Chat Profile Name	Select a chat profile to apply to the fluid component.
Chat Profile	Click the Chat Profile link to view and edit the associated chat profile setup.
Agent Popup Page ID	Select a CRM full-functional page from the drop-down list box. When users initiate chat sessions from a Fluid self-service page, the associated CRM page is displayed in the agent chat window.
Agent Popup	Click the Agent Popup link to view the selected agent popup page on the Agent Popup Fluid Page Definition.

Agent Popup Page Definition Page

Use the Agent Popup Page Definition page to define the mapping between self-service components and full-functional page setup.

You can associate an agent pop-up page (a full-functional page) with multiple self-service components on the Agent Popup Page Definition page, the system uses the one mapping that's specified on the Chat Enabled Page Setup page at runtime.

Navigation:

Set Up CRM > Product Related > Multichannel Definitions > Chat > Fluid Setup > Agent Popup - Fluid

This example illustrates the fields and controls on the Agent Popup Fluid Page Definition.

[Enable Chat](#)

Agent Pop Up Fluid Page Definition

Page ID 360DVW
Component RB_TD_360
Template ID
App. Class AgentPopup
Description Customer or Worker's 360-degree view page

Page Name RB_TD_AGENT_VIEW
Menu Name RB_TD_360
App. Package RB_CHAT_FL
App. Method GenerateURL

Component Name
RC_CASE_SS_SRCH_FL
RC_SS_CCASE_FL
RC_SS_FAQ_FL
RC_SS_ISSUES_FL
RC_SS_MCASE_HHD_FL
RC_SS_SOLN_DTL_FL
RC_SS_SRCH_FL
RC_SS_TOPSOLN_FL

Add Component

Modify System Data

This object is maintained by PeopleSoft.

Modified 02/04/2004 4:59PM PST QXIE

Save
Return to Search
Notify
Add
Update/Display

Field or Control	Description
Page ID	Displays the name that uniquely identifies the full-functional page.
Page Name	Displays the name that uniquely identifies the full-functional page. Some pages share the same page and component names (for example, support case, helpdesk case, and helpdesk case for human resources pages), the system uses the page ID to distinguish them.
Component	Displays the name of the self-service component.
Template ID	Displays the display template ID used by the full-functional page, if applicable.

<i>Field or Control</i>	<i>Description</i>
App Package	Displays the system delivered application package name that contains the application classes and methods used to define the mapping between fluid self-service components and full-functional pages.
App Class	Displays the specific application class that contains all methods used to define the mapping between fluid self-service components and the full-functional page.
App Method	Displays the PeopleCode application class method name that is used to populate all application keys needed to open the full-functional page.

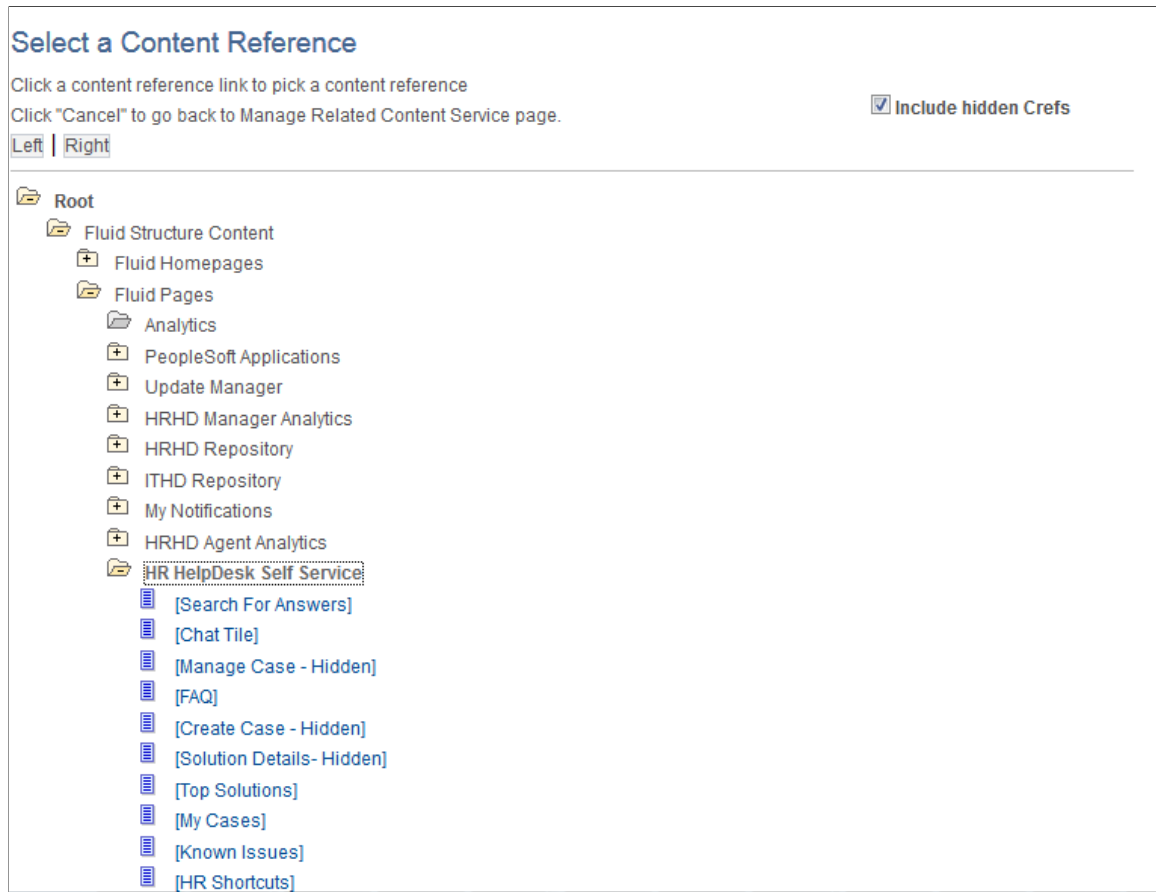
Select the Agent pop up page ID and add the list of fluid components, which uses the corresponding page id.

Steps to Assign Related Content Service on Fluid Components

To assign Chat with Agent Related Content Service on fluid components, perform the following:

1. Navigate to **People Tools > Portal > Related content Service > Manage Related Content Service**
2. Click on Assign Related Content Service.
3. Select the content reference of the component on which the “Chat with Agent” has to be enabled.

This example illustrates the fields and controls on the Select a Content Reference page.



4. Under Component Level Related Content, add Service and choose the service ID as RC_CHATREQUEST.

This example illustrates the fields and controls on the Assign Related Content page.

Enable	Service Type	Select	Service ID	Sequence number	Service Label	Personalization Flag	Configure
☒	Service		RC_CHATREQUEST	1	Chat with Agent	☒	Configure

5. Click on Configure button and set the parameters as shown:

This example illustrates the fields and controls on the Configure Service page.

Configure Service

Service ID

RC_CHATREQUEST

Service Label

Chat with Agent

Map Parameters

Q

1-4 of 4

View All

	Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Refresh Service On Change	Is Value Required?
1	ComponentVar	Name of the Component	☐	System Variable	☐	%Component		☐	☐
2	DispTemplateCode	Display Template Family Code	☐	Key Field	☐	Display Template Family Code		☐	☐
3	Param1	Parameter1	☐					☐	☐
4	Param2	Parameter 2	☐					☐	☐

Note: The parameters 1 and 2 has to be left blank for all the Self Service components except Manage Case and Solution Details.

For Manage Case, values for Parameter 1 and Parameter 2 has to be set as below.

This example illustrates the fields and controls on the Map parameters page.

Map Parameters

Q

1-4 of 4

View All

	Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Refresh Service On Change	Is Value Required?
1	ComponentVar	Name of the Component	☐	System Variable	☐	%Component		☐	☐
2	DispTemplateCode	Display Template Family Code	☐	Key Field	☐	Display Template Family Code		☐	☐
3	Param1	Parameter1	☐	Key Field	☐	Business Unit		☐	☐
4	Param2	Parameter 2	☐	Key Field	☐	Case ID		☐	☐

For Solution Details, values for Parameter 1 and Parameter 2 has to be set as below.

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This example illustrates the fields and controls on the Map parameters page.

Map Parameters ?									
						1-4 of 4		View All	
	Parameter Name	Parameter Label	Required Flag	Mapping Type	Select	Mapping Data	Mapping Details	Refresh Service On Change	Is Value Required?
1	ComponentVar	Name of the Component	☐	System Variable	☐	%Component		☐	☐
2	DispTemplateCode	Display Template Family Code	☐	Fixed Value		CRM_HHD		☐	☐
3	Param1	Parameter1	☐	Key Field	☐	SetID		☐	☐
4	Param2	Parameter 2	☐	Key Field	☐	Solution ID		☐	☐

Chat Schedule of Agents

Chat Related Content tile will be visible based on the Agent Schedule specified in Home Page – Chat Schedule page. For details, see [Home Page - Chat Schedule Page](#)

When the chat functionality is configured, the following fluid pages have the Chat with Agent tile:

- Search for Answers
- Solution Details
- Top Solutions Page
- FAQ
- Known Issues
- Manage Cases
- Create Case
- My Cases

Integrating a Case with Third-Party Systems

Understanding the Case EIP

The Case EIP integrates the PeopleSoft CRM case with third-party systems. The Case EIP is developed generically for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, and all PeopleSoft CRM verticals. The Case EIP enables you to:

- Create a case from a third-party system.
- Update a case from a third-party system.
- Request case information from a third-party system.

This is a guide for technical users, installers, system administrators, and programmers who implement, maintain, or develop Case EIP.

Defining Case EIP Functionality

This topic discusses:

- Assumptions about the case EIP.
- Case EIP functionality.
- Delivered EIPs.
- Technical process flows.
- Error handling.

Assumptions About the Case EIP

When considering the Case EIP, you must be aware of the following:

- To create a support case, these customer information fields must be provided: Customer BO ID, Customer Role Type ID, Display Template Family CodeID, and Contact BO ID.

Note: The Display Template Family Code is required for creating a case, not for updating it. If a default Display Template Family Code is specified in the user default setup, the third-party vendor does not have to provide it; case creation will occur. If no business unit or display template is provided in the incoming request message and if the user does not have defaults defined, the system sends an error message back to the third-party vendor.

- The third-party system needs to send the appropriate business unit, vertical, and market values in the request, unless these values can be provided by default from user reference.
- The Case EIP is developed using PeopleTools Integration Broker technology.
- The Case EIP does not use bulk loading.

The Case EIP feature is intended to automatically create and update cases from third-party systems; it is not for data-conversion purposes.

- The Case EIP and related case component interfaces are meant for the agent-facing case, not for self-service.
- When creating a note for a case using the Case EIP, the system leaves the customer, contact, and employee information blank.

The Case EIP cannot create a note for a different customer, contact, or employee.

- A case may use attributes.

An attribute can be of any data type (string, number, date, and so on). The system stores different data types in the matching data type field in the request message. It is the responsibility of the third-party system to provide the correct data format for attributes when creating attributes for a case.

- The case component can be configured to enable or disable functionality and to hide or unhide fields on the Case page.

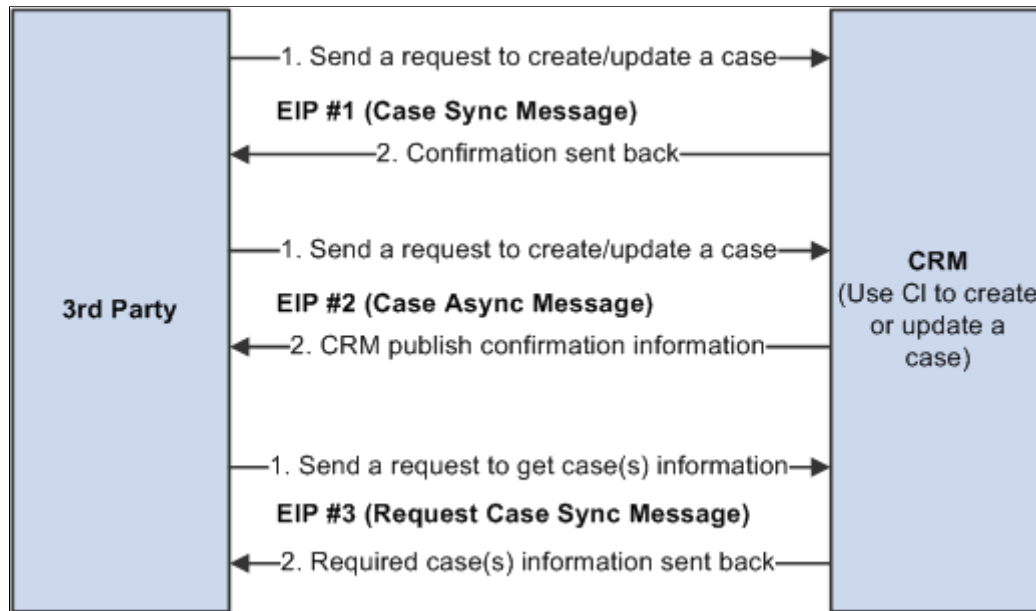
The case component is rendered based on the display template. When customers send a request to create a case, it is assumed that they will not send information that has been disabled or hidden. The Case EIP will not do additional validation that is based on configuration settings.

See “Understanding Display Templates” (Automation and Configuration Tools).

Case EIP Functionality

The Case EIP provides a bi-directional EIP in PeopleSoft CRM for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, and all PeopleSoft CRM verticals. It provides a transactional framework that enables your call center to send and receive case information to and from any third-party applications.

This diagram illustrates the Case EIP process flow.



Delivered EIPs

The following EIPs, as shown in the previous diagram, are provided:

- EIP #1 - Case Synchronous EIP.
- EIP #2 - Case Asynchronous EIP.
- EIP #3 - Request Case Information EIP (Synchronous).

Note: If the request contains a case ID, a new case is not created. The existing PeopleSoft CRM case is updated with the pertinent information supplied in the request. If the case ID passed in is invalid, no case is updated and an error message is sent back.

Warning! When you create a case, make sure the value of the **CASE_ID** field in the request message is empty or 0. When you update a case, make sure the CASE_ID value is a valid value that exists in the CRM RC_CASE table.

Case Synchronous EIP

The third-party application sends a request to CRM to create or update a case and waits for the response. Once the system processes the case in CRM, confirmation information is sent back to the third-party application.

This EIP has one web service (RC_CASE_REQUEST_SYNC), which contains one service operation (RC_CASE_REQUEST_SYNC) with two messages:

- RC_CASE_REQUEST_SYNC - Inbound synchronous request message.
- RC_CASE_RESPONSE_SYNC - Outbound synchronous response message.

The processing details are as follows: when a request message is received, the on request event calls an appropriate case component interface (CI) to process information from the request message and saves the information into the Case component. The system sends a response message back to the third-party system with confirmation information. The response message may contain information that CRM populates, such as case ID, assigned provider group, and agent.

Since the third-party system is waiting for the response from CRM, the system processes only one case per message.

Case Asynchronous EIP

The third-party system sends a request to create or update a case, and it is not waiting for the response. Once the case is created or updated, CRM publishes confirmation information back to the third-party.

This EIP has two web services:

- `RC_CASE_REQUEST_ASYNC`, which contains one service operation (`RC_CASE_REQUEST_ASYNC`) with the message `RC_CASE_REQUEST_ASYNC` (inbound asynchronous message).
- `RC_CASE_RESPONSE_ASYNC` - which contains one service operation (`RC_CASE_RESPONSE_ASYNC`) with the message `RC_CASE_RESPONSE_ASYNC` (outbound asynchronous message).

The processing details are as follows: when CRM receives the request, it calls the appropriate case CI to create or update a case and then publishes case information back to the third party.

Since the third-party system is not waiting for the response from CRM, the request message may include information from multiple cases in one message. CRM processes them one by one. The system issues a commit at the end of each successful case.

Request Case Information EIP (Synchronous)

The third-party system sends a request to CRM to find case information. The request may contain multiple cases. CRM processes the request and sends the information for the case or cases back to the third-party system.

This EIP has one web service (`RC_CASE_INQUIRY_REQ_SYNC`), which contains one service operation (`RC_CASE_INQUIRY_REQ_SYNC`) with two messages:

- `RC_CASE_INQUIRY_REQ_SYNC` - Inbound synchronous request message.
- `RC_CASE_INQUIRY_RESP_SYNC` - Outbound synchronous response message.

The processing details are as follows: the request message may have one or more Case IDs, the on request event is triggered, and the CRM system processes the rowset of the message to populate case information, one by one. The system uses a direct SQL query instead of a CI.

Technical Process Flows

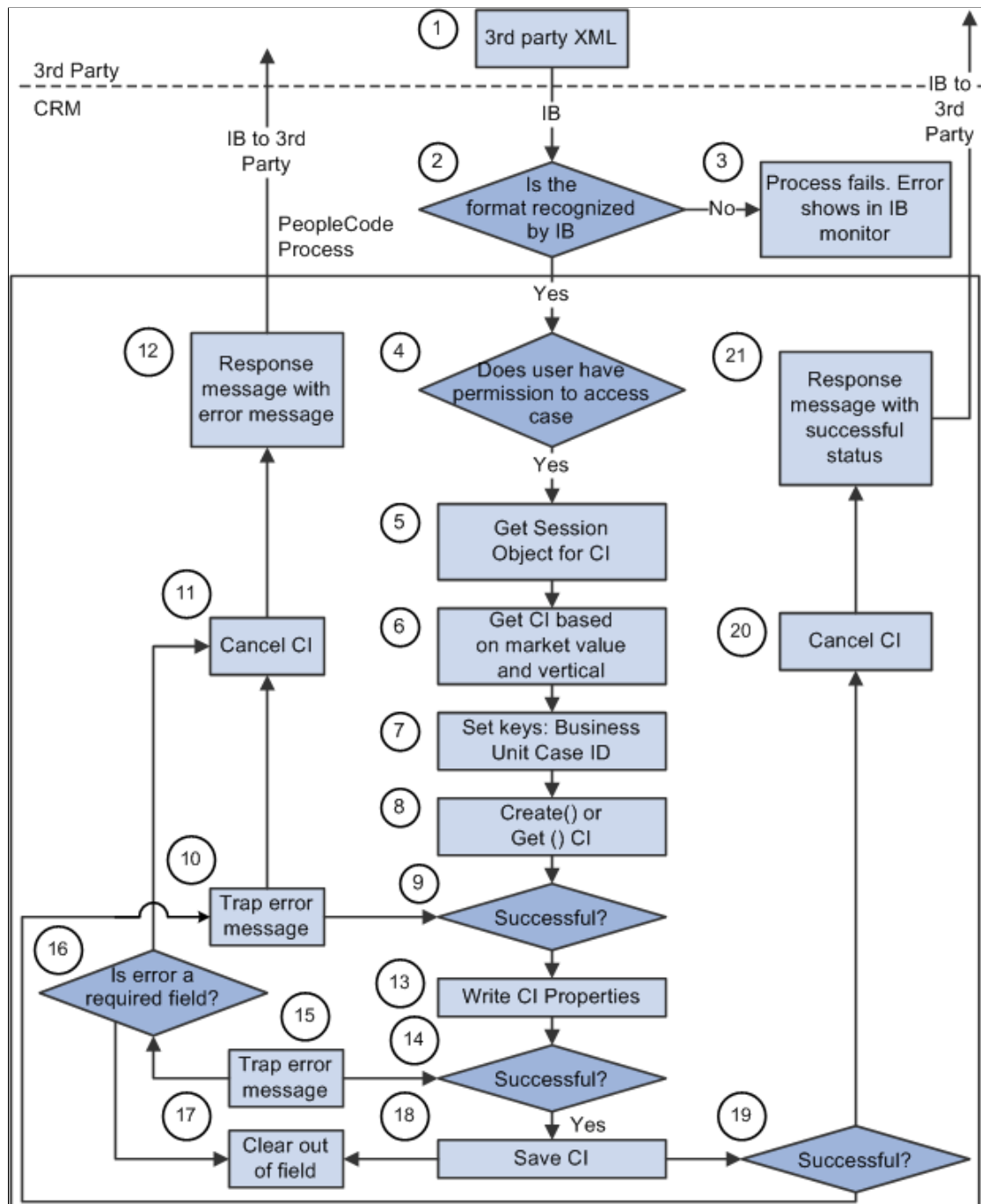
The logic of EIP #1 (Case Synchronous EIP) and #2 (Case Asynchronous EIP) are the same except for the way in which they are initiated.

EIP #1 is triggered from an OnRequest event. The system generates a sync response message and returns it to the third-party system.

EIP #2 is triggered from an OnNotify event. The system publishes a response message for the third-party application.

EIP #1 and #2 share the same PeopleCode function, ProcessCaseEIP is defined in the FUNCLIB_RC_EIP.CASE_EIP field formula.

The following diagram illustrates the technical process flow for both EIP #1 and EIP #2.



This list indicates where you are in the process flow diagram:

1. The third-party sends an XML request to CRM by way of the integration gateway by using a web service.
3. If integration broker (IB) does not recognize the format, the message is trapped in integration broker.

The process fails (this is standard integration broker functionality).

See *PeopleTools: Integration Broker Service Operations Monitor*

See *PeopleTools: Integration Broker Testing Utilities and Tools*

4. OPRID, which is required, is used to validate whether the user has access to the requested case.

Once the user passes security checking, the system creates a case or updates it through integration broker. The integration broker user ID is used to create or update a case. This is the user ID that is used to start the application server.

5. If the user passes the security check, the system obtains a session for component interface processing.
6. When creating a case, BUSINESS_UNIT is required.

The system automatically assigns the next new CASE_ID. If BUSINESS_UNIT is not supplied when creating a case, CRM uses the default business unit from user preferences. When updating a case, only CASE_ID is required since it is a unique identifier.

7. Based on the Case ID value, the system decides whether to insert or update a case.

When no Case ID is provided, CRM creates a case by calling the *create()* method of CI. When the Case ID is provided, CRM checks whether the Case ID exists in CRM. If it exists, the case is updated by calling the *get()* method; otherwise, the system does not do any case processing. The system generates a response message with CASE_EIP_STATUS = 1 (failed) and CASE_EIP_ERROR_MSG - *Update failed. Case 123 does not exist in CRM.* PeopleCode function *IsCaseExist* in FUNCLIB_RC_EIP. The CASE_ID FieldFormula checks if the case exists.

8. If the create() or get() method fails, the system generates an error message in RC_CASE_EIP_ERR for the response message.

The system cancels the CI to reset the instance (process 11), and sends the response message with the error message back to the third-party (process 12).

9. Once the create() or get() method passes successfully, CRM sets the CI properties as supplied in the request message.

When the third-party application sends a request to create a support case or a Higher Education case for a company contact or consumer, CRM requires customer and contact information.

For customer information, the third-party application can either provide CUST_ID or BO_ID_CUST.

If BO_ID_CUST is provided, CRM uses it directly to create a case.

Conversely, if only CUST_ID is provided, CRM uses the RD_COMPANY table to derive BO_ID_CUST in order to create a case.

The function to get BO_ID_CUST is based on CUST_ID is the PeopleCode Function *GetCustBObyID* in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

For contact information, the third-party application can either provide the PERSON_ID or BO_ID_CONTACT.

When BO_ID_CONTACT is provided, CRM uses it directly; otherwise, contact PERSON_ID is used to derive BO_ID_CONTACT from the RD_PERSON table.

The function to get BO_ID_CONTACT is based on PERSON_ID, the PeopleCode Function *GetPersonBObyID* in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

Considerations for HelpDesk or HelpDesk for Human Resources Cases, or for Service Center for Higher Education Case for Worker

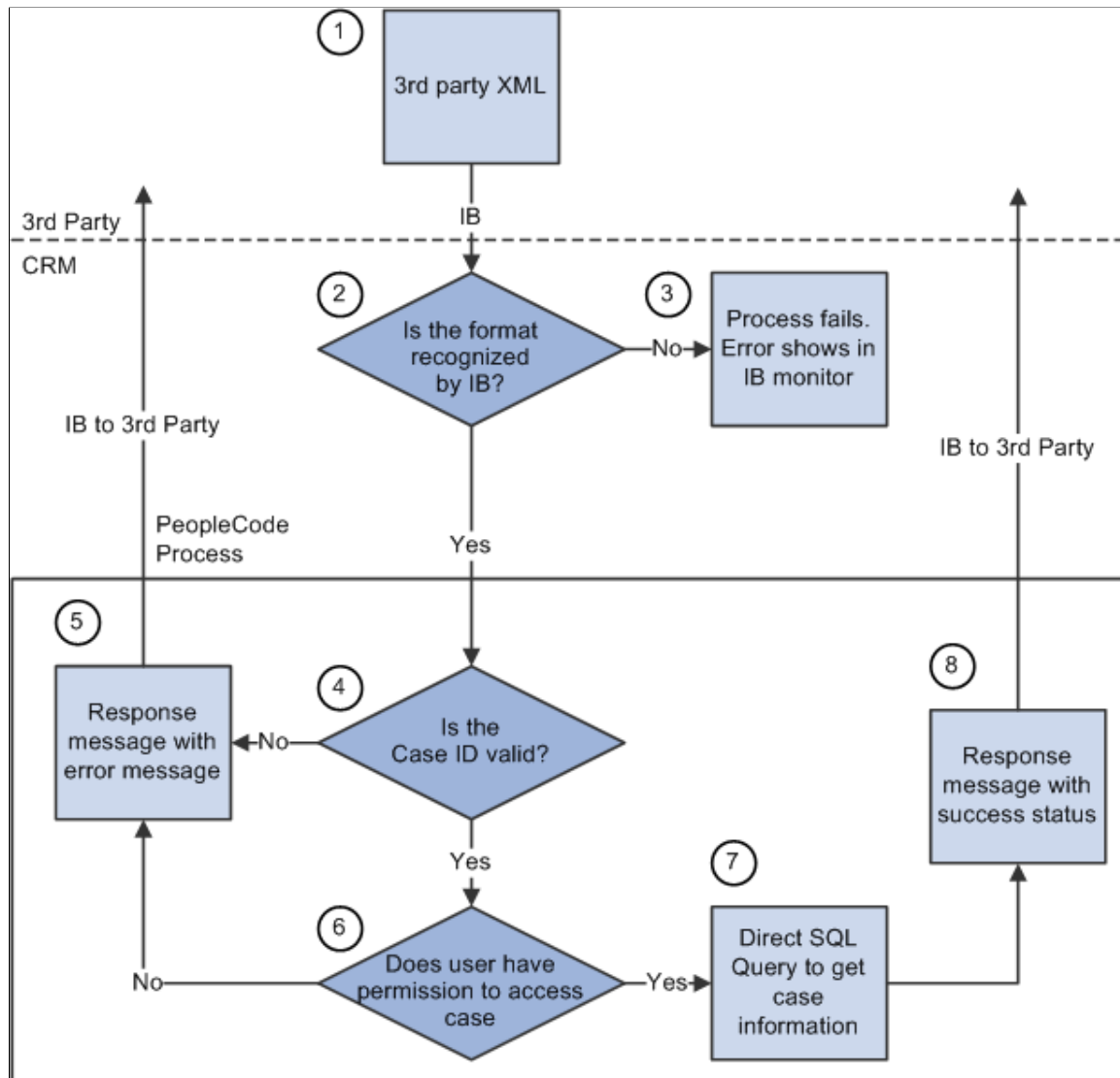
The third-party application must provide employee information when it sends a request to create a help desk case. To create a case, the third-party application must also supply the EMPLID, as CRM uses it to derive appropriate BO_ID_CUST with ROLE_TYPE_ID_CUST.

BO_ID_CUST and ROLE_TYPE_ID_CUST need to be populated internally for a case.

Note: Tip: When creating a support case for a customer, make sure BO_ID_CUST (or CUST_ID), ROLE_TYPE_ID_CUST, BO_ID_CONTACT (or CONTACT_PERSON_ID), ROLE_TYPE_ID_CNTCT is provided. When creating a HelpDesk case for an employee, make sure the EMPLID is provided. The POI (person of interest) is supported for PeopleSoft HelpDesk for Human Resources cases only. Third-party vendors must pass a valid worker for creating an IT help desk case, and a valid worker or POI for creating a HelpDesk for Human Resources case. Higher Education cases support company contact, consumer, and worker. When creating a Higher Education case, provide either customer or employee information based on what type of case you want to create.

15. If the setting of a CI property for a field fails, the system traps an error message in the &PSMessage object with information on which field caused the error.

The following diagram illustrates the technical process flow for EIP #3.



1. The third-party application sends an XML request to CRM by way of the integration gateway.

2. If the integration broker (IB) does not recognize the format, the request is trapped in integration broker.

The case process fails.

3. When a message is passed in from integration broker, the PeopleCode process begins.

The system checks if the case ID exists in PeopleSoft CRM. If the case does not exist in PeopleSoft CRM, the system sends back a response message with an error message (process 5).

4. If the case exists in CRM, PeopleSoft CRM checks if the user has access to the case component based on the market and vertical, and the system gathers market and vertical information.

If a user does not have access, a response message is sent back immediately with the access denied error message (process 5).

The function to check access permission is:

IsUserAuthorized in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

5. Once the user passes the security check, the system executes a direct SQL query to get all case related information and send it back to the third party (process 8).

Error Handling

When a required field contains an invalid value in a request message, or the save event fails, the process fails. The system copies the request message over to response message, and the response message is sent back to the third party with an error message.

When a non-required field contains an invalid value, the system ignores that field and case processing continues. The system sends back a warning message.

Here are some tips:

- Always check fields CASE_EIP_STATUS and CASE_EIP_GEN_MSG first in the response message.

When the status is 0 or 2, the response message contains case information that is stored in the PeopleSoft CRM system. When the status is 1 (that is, when the case has failed), nothing is saved in PeopleSoft CRM, and the response message contains a copy of the request information, not the case information stored in CRM. This functionality aids in error handling.

- When CASE_EIP_STATUS fails or a warning is issued, the system logs a detailed error or warning message in the rowset RC_CASE_EIP_ERR of the response message.

Implementing Case EIP

This topic discusses:

- Code processing for Case EIP.
- Setup configuration.
- Case EIP setup.

Code Processing for Case EIP

For Case EIP #1 (Case Synchronous Message), the entry point is in the service operation RC_CASE_REQUEST_SYNC OnRequest handler. It calls ProcessCaseEIP function in FUNCLIB_RC_EIP.CASE_EIP FieldFormula.

For Case EIP #2 (Case Asynchronous Message), the entry point is in service operation RC_CASE_REQUEST_ASYNC, onNotify handler. It calls the same ProcessCaseEIP function as EIP #1.

For Case EIP #3 (Request Case Synchronous Message), the entry point is in service operation RC_CASE_INQUIRY_REQ_SYNC OnRequest handler. It calls ProcessCaseInquiry function in FUNCLIB_RC_EIP.CASE_EIP FieldFormula.

Setup Configuration

The two setup options for case EIP are:

- Number of notes for a case.
- Default value for Source EIP.

Number of Notes for a Case

The **Max # of Notes in Web Service** field indicates the maximum number of notes to return in the request EIP. The case component can contain an unlimited number of notes. This setup affects Case EIP performance when trying to process hundreds or thousands of notes for a case. Based on your business requirements, you can set the upper limit number for Case EIP.

Note: This setting is only applied to response messages. Request messages process all notes that a third party sends.

For instance, the customer sets the default number of notes for the response message at five. When the request message contains more than five notes, the system processes all the notes that are saved into the case. When a case contains more than five notes and a third party is requiring case information, then the system returns only the five most recent notes in the response message.

This page shows the **Max # of Notes in Web Service** field on the Call Center Definition - Options page:

This example illustrates the fields and controls on the Call Center Definition - Options page.

Enable Feature	Option	Notes
☒ Assign Person	Assign agent entering case	Automatically assign the case when it is saved
☒ Assign Provider Group	Assign based on Agent	Automatically assign the case when it is saved
☒ Call Center Manager	Angela Lucca	Call center manger for the selected business unit.
☒ Max # of Notes in Web Service	5	Limit the number of notes in Web Service if you tend to have many notes in your cases
☒ Product Prompt	All	Choose how you would like the product prompt to work

Default Value for Source Web Service

A customer can define the source value to use when creating a case using the Case EIP. It can be a different source value from the cases that are created online.

This example shows the Case Defaults page:

This example illustrates the fields and controls on the Case Defaults page.

Note: The source EIP web service options are driven by business unit.

Case EIP Setup

Activate these service operations along with their handlers and routings:

- RC_CASE_REQUEST_SYNC
- RC_CASE_REQUEST_ASYNC
- RC_CASE_RESPONSE_ASYNC
- RC_CASE_INQUIRY_REQ_SYNC

As delivered, PeopleSoft service operations are inactive. In both your PeopleSoft CRM and your third-party application, you must:

- Activate the required application service operations.
- Activate the service operation handler and routing.
- Set the associated message queue to run mode for asynchronous service operations.

See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor* and *PeopleTools: Integration Broker Testing Utilities and Tools*.

PeopleSoft Call Center Interactive Reports

Understanding Interactive Reports

PeopleSoft call center interactive reports are implementations of PeopleTools Analytic Calculation Engine (ACE). Interactive reports are dynamic and they provide analytic information to users. You can move data elements around on a report and view it using different dimensions. The ability to view reports at different angles, gives you visibility into the health of your call center, including the ability to:

- Detect trends that can be utilized for proactive problem management.
- Evaluate team and agent performance metrics.
- Anticipate training and staffing requirements.

You can save interactive reports, export them to Microsoft Excel, or print them as hard copies. While interactive reports are interactive, the communication between them and the CRM database is one-way, which means the changes you make on the reports do not affect the data in the database. From interactive reports, you are not allowed to transfer to any CRM components and access data. User roles control access to interactive reports.

Note: You must have Internet Explorer 5.1 or higher to access these reports.

Launching and Working with Interactive Reports

Interactive reports use action types and workflow to capture response and restore times. If the action types defined for the response are not met, an Application Engine process updates the case with response and restore exceptions.

When you launch an interactive report, the system displays a view of the data that the system has captured. These views are built using PeopleTools Analytic Calculation Engine (ACE) technology.

Common Elements Used for Interactive Reports

<i>Field or Control</i>	<i>Description</i>
Run Control ID	Select from the list of run control IDs. These IDs identify a set of saved report parameters from previous launches and enable you to save time and reduce mistakes. Use the Add New Run Control tab to generate reports when you don't have a run with the desired business unit, customer, or date range.

Field or Control	Description
Business Unit	Select the business unit for which you want to launch the interactive report. This is a required field.
All Customers	Select to launch the interactive report for all customers within the selected business unit.
Select Customer and Customer	Select to launch the interactive report for an individual customer and then select a customer from the Customer field.
Start Date	Select the first date from which you want to view data for the interactive report. This is a required field.
End Date	Select the last date from which you want to view data for the interactive report. This is a required field.
Launch Interactive Report	Click to launch the Interactive Report. The system opens a separate window to display the data.

Launching and Viewing Interactive Reports

This topic discusses how to launch and view interactive reports.

Pages Used to Launch and View Interactive Reports

Page Name	Definition Name	Usage
<u>Service Operations Analysis Page</u>	RC_SUP_MUPD	Launch the PeopleSoft Support Service Operations Analysis report.
<u>Support Service Level Management Analysis Page</u>	RC_SUP_SUPD	Launch the PeopleSoft Support Service Level Management Analysis report.
<u>Help Desk Service Level Management Analysis Page</u>	RC_HD_SUPD	Launch the PeopleSoft Help Desk Service Level Management Analysis report.
<u>Change Metrics Update Page</u>	RG_CHG_METRIX_UPD	Launch the PeopleSoft HelpDesk Change Metrics report.

Page Name	Definition Name	Usage
<u>Forward Schedule Page</u>	RG_FWD_SCHED_UPD	Launch the PeopleSoft HelpDesk Forward Schedule report. This report captures change requests that are in the statuses of <i>Approved</i> and <i>Executing</i>. The reports should also have start and end dates populated on the requests. You must set the run control dates to encompass the start dates of the change requests in the above statuses. In other words, if you want to know how many requests are approved or executing and scheduled for the month of May, enter run control start dates of 5/1/2006 and 5/31/2006.

Related Links

“Understanding Interactive Reports” (Application Fundamentals)

Service Operations Analysis Page

Use the Service Operations Analysis page (RC_SUP_MUPD) to launch the PeopleSoft Support Service Operations Analysis report.

Navigation:

Support > Interactive Reports > Service Operation Analysis

This example illustrates the fields and controls on the Service Operations Analysis launch page.

Existing Run Control | **Add New Run Control**

Report Name Service Operations Analysis

Run Control Information

*Run Control ID 006

Run Control Criteria

*Business Unit US200

Customer Information

☒ All Customers ☐ Select Customer Customer

Start Date 01/01/2000 End Date 12/31/2000

Launch Interactive Report

Service Operations Analysis

Service Operations Analysis | Preferences | View All | First | 1-6 of 6 | Last

Product All Products Provider Group All Groups

Agent All Agents Priority All Priorities

	Opened Cases Count	Closed Cases Count	Canceled Cases Count	Service Order Count	RMA Count
All Customers	20	0	0	0	0
Health Conscious.com	6	0	0	0	0
Lakeview Community College	4	0	0	0	0
MMA Property Management Group	6	0	0	0	0
Savannah Lee	2	0	0	0	0
Tomas Santiago	2	0	0	0	0

Use this report to track the number of cases opened, cases closed, cancelled cases, and service orders

Support Service Level Management Analysis Page

Use the Support Service Level Management Analysis page (RC_SUP_SUPD) to launch the PeopleSoft Support Service Level Management Analysis report.

Navigation:

Support > Interactive Reports > Service Level Management

This example illustrates the fields and controls on the Support Service Level Management Analysis launch page.

Existing Run Control | **Add New Run Control**

Report Name Support Service Level Management Analysis

Run Control Information

*Run Control ID 002

Run Control Criteria

*Business Unit APP01

Customer Information

☒ All Customers
☐ Select Customer

Customer

*Start Date 01/01/2005 *End Date 12/31/2005

Launch Interactive Report

Support SLM Dashboard

Support Service Level Management Analysis | Preferences | View All | First | 1-3 of 3 | Last

Customer All Customers **Product** All Products
Provider Group All Groups **Agent** All Agents
Status All Statuses **Status Category** All Status Categories

	Responded On-Time	Responded Late	% Responded Late	Restored On-Time	Restored Late	% Restored Late	Sus
All Priorities	0	2	67	0	3	100	0
Low	0	0	0	0	1	100	0
Medium	0	2	100	0	2	100	0

Use this report to track the total number of cases in which the support agent or agents responded on time, responded late, restored service on time, restored service late, or suspended cases.

Help Desk Service Level Management Analysis Page

Use the Help Desk Service Level Management Analysis page (RC_HD_SUPD) to launch the PeopleSoft Help Desk Service Level Management Analysis report.

Navigation:

HelpDesk > Interactive Reports > Service Level Management

This example illustrates the fields and controls on the Help Desk Service Level Management Analysis launch page.

Existing Run Control | Add New Run Control

Report Name Help Desk Service Level Management Analysis

Run Control Information

*Run Control ID 005

*Business Unit HRHDC

*Start Date 01/01/2005

*End Date 06/30/2005

Launch Interactive Report

Help Desk Service

Help Desk Service Level Management Analysis | Preferences | View All | First | 1 of 1 | Last

Employee All Employees

Location All Locations

Provider Group All Groups

Status All Statuses

Department All Departments

Product All Products

Agent All Agents

Status Category All Status Categories

	Responded On-Time	Responded Late	% Responded Late	Restored On-Time	Restored Late	% Restored Late	Sus
All Priorities	0	0	0	0	0	0	0

Use this report to track the total number of cases in which the help desk agent or agents responded on time, responded late, restored service on time, restored service late, or suspended cases.

Change Metrics Update Page

Use the Change Metrics Update page (RG_CHG_METRIX_UPD) to launch the PeopleSoft HelpDesk Change Metrics report.

Navigation:

HelpDesk > Interactive Reports > Change Request Metrics

This example illustrates the fields and controls on the Change Metrics Update launch page.

Change Metrics Update | **Change Metrics Add**

Change Metrics

Run Control Information

*Run Control ID: 001
 Description: Change Metrics 05
 *From Date: 01/01/2005
 *To Date: 12/31/2005

Launch Interactive Report

Change Metrics

Change Request Metrics | Preferences | View All | First | 1 of 1 | Last | ?

Business Unit	All Business Units	Department	All Departments
Location	All Locations	Priority	All Priorities
Category	All Categories	Impact	All Impacts
Status	All Statuses		

	Percent of Total Request	Number of Inserts
All Weeks	0.00	0

Use this report to track the number of requests opened.

Forward Schedule Page

Use the Forward Schedule page (RG_FWD_SCHED_UPD) to launch the PeopleSoft HelpDesk Forward Schedule report.

This report captures change requests that are in the statuses of *Approved* and *Executing*. The reports should also have start and end dates populated on the requests. You must set the run control dates to encompass the start dates of the change requests in the above statuses. In other words, if you want to know how many requests are approved or executing and scheduled for the month of May, enter run control start dates of 5/1/2006 and 5/31/2006.

Navigation:

HelpDesk > Interactive Reports > Forward Schedule of Changes

This example illustrates the fields and controls on the Forward Schedule Update launch page.

Forward Schedule Update Forward Schedule Add

Forward Schedule

Run Control Information

*Run Control ID: 005

Description: Forward Sched 07

*From Date: 01/01/2007

*To Date: 12/31/2007

Launch Interactive Report

Forward Schedule - Report Date: 2014-10-01 Preferences | View All | First 1-11 of 11 Last

	Status	Phase	Request Type	Change Summary	Priority	Category	Impact
ITHDK							
400003	Approved	Scheduling	Hardware	Change Request For a Hardware Upgrade	Medium	Minor	Trivial
400002	In Review	Scheduling	Hardware	Change Request For a Hardware Fix	Medium	Minor	Minor
400001	New	Scheduling	Hardware	Change Request For a Hardware Upgrade	Medium	Major	Minor
US200							
400004	Approved	Implementation	Training Course	Change Request For a Training Course	Medium	Significant	Significant
400002	New	In Test	Software	Change Request for Software Requirement	High	Minor	Major
400003	In Review	In Test	IT Infrastructure Management	Change Request for Infrastructure Management	High	Significant	Significant
US300							
400004	Executing	In Test	Hardware	Change Request For a Hardware Facility	High	Significant	Significant
400003	Approved	Implementation	Hardware	Change Request For a Hardware Requirement	High	Major	Significant
400001	New	In Test	Software	Change Request For a Software Requirement	Medium	Minor	Significant
400005	Approved	In Test	Documentation	Change Request For a Procedure Document	Medium	Significant	Trivial
400002	In Review	In Test	Software	Change Request For a Software Requirement	High	Significant	Significant

Use this report to view a forward schedule of changes.

The analytic grid will list all change requests having the start and end date within the requested *From Date* and *To Date*. The full list of fields in the report is as follows:

- Business Unit
- Change ID
- Status
- Phase
- Request Type
- Change Summary
- Priority
- Category
- Impact
- Start Date and Time
- End Date and Time

- Production Release Date
- Outage Required
- Requester
- Interested Parties
- Owner

Integrating Oracle's Enterprise Manager with PeopleSoft CRM HelpDesk

Understanding Oracle's EM System Integration with PeopleSoft CRM

This topic discusses:

- How it works.
- Integration flow process.
- Connector descriptor.
- Trouble ticket template.
- Sample case created from EM.

How it works

Enterprise Manager (EM) is Oracle's integrated solution for administering and monitoring software and systems. It provides Application Performance Management, distributed database and application server administration, and automated tuning of Oracle environments.

Oracle's EM utilizes a notification system that enables users to set up event rules which generate notifications (for example you may want the system to issue an alert when disk space is 99% full). When such an event occurs, the system can create a case within Oracle's PeopleSoft HelpDesk application, which can assign a worker to take action to resolve the case.

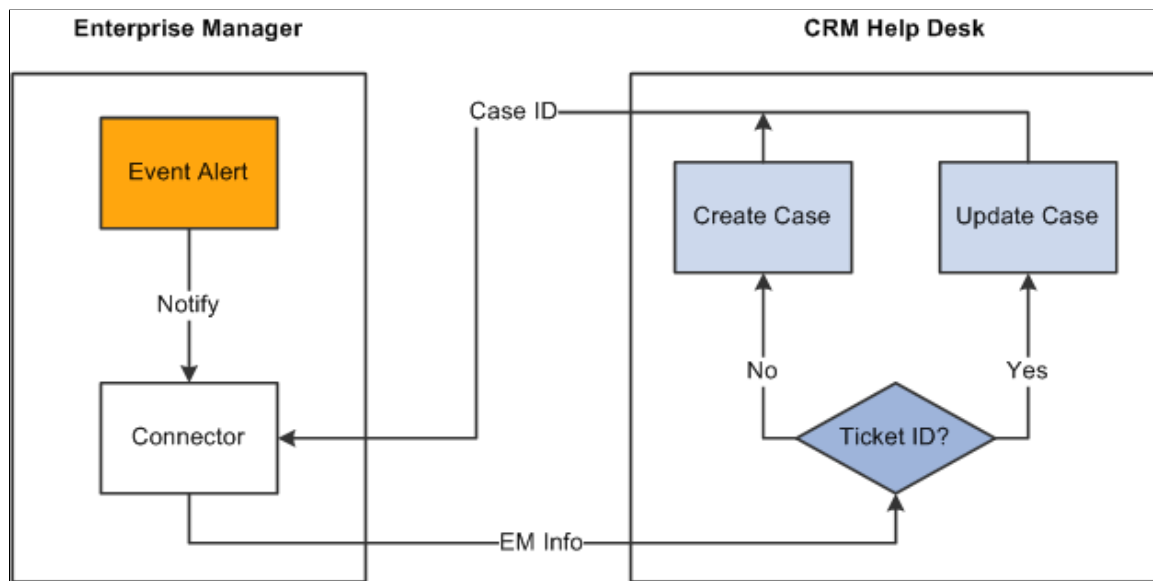
Through the notification system, PeopleSoft Case Connector (trouble ticketing system connector) integrates with Oracle's Enterprise Manager. When the system triggers a rule, the connector is notified and a case is created or updated based on a trouble ticket template. The system then sends a response message with the case ID (ticket ID) back to Enterprise Manager.

Once the case is created, a help desk user can drill into the details on the EM Alert page from the case. In addition, an EM user can drill back to the case from the EM Detail page.

Integration flow process

When a defined rule in EM is triggered, the connector is notified to create or update a case. The case ID is then sent back to the EM system.

This illustration shows the integration between PeopleSoft's CRM HelpDesk application and Oracle's EM system.



Connector Descriptor

The connector descriptor describes how the EM system communicates with the CRM case trouble ticketing system. The connector descriptor is an XML based file that defines the PeopleSoft web service end point for service operations and the authentication schema. It also cross-references a URL to link an alert back to a case. Once the connector is deployed, the user can configure it on the connector console.

Authentication is completed while mapping data from web services security (WS-security or wsse) on the case to the TicketingConnector authentication. TicketingService methods, such as *createTicket* or *updateTicket*, are used in EM to create or update a ticket

The BaseURL in the connector descriptor is the base URL for the EM console. The ExternalURL is the URL pointing to CRM case.

Note: WS-Security is a building block that is used in conjunction with other web services and application-specific protocols to accommodate a wide variety of security models and encryption technologies. WS-Security describes enhancements to SOAP (Simple Object Access Protocol) messaging to provide quality of protection through message integrity, message confidentiality, and single message authentication. These mechanisms are used to accommodate a wide variety of security models and encryption technologies. For this release, EM supports UserNameToken security on SOAP headers.

Trouble Ticket Template

The Trouble Ticket template is an XSLT file that transforms a message from the EM model format to the CRM model format. It is based on the XML schemas of the EM Alert and the Trouble Ticketing system.

The templates are used to construct tickets in the context of an EM alert. When a PeopleSoft Connector is notified, the EM alert information is transformed into a trouble-ticketing message that is used to create or update a case in the trouble ticketing system.

PeopleSoft delivers several default trouble ticket templates. You can easily modify them to fit your needs. The delivered XSL files include

- PSFTSampleTicketTemplate.xsl; default ticket template used to create or update a case.
- PSFTSampleTicketTemplate_AutoClose.xsl: used to create a new case if none already existed, or to add a note and auto close an existing case after it has been updated.
- createTicketResponse.xsl: used to transform the response from CRM to EM when the CreateCase or UpdateCase method is invoked. It returns the Case ID from CRM help desk as a Ticket ID to EM.

The system will create a new case or update an existing case depending on whether the ticket ID is provided in the EM alert message. If no case ID is provided from EM, the system creates a new case; otherwise, the system updates the case with the given case ID.

When creating a new case, the system adds an anonymous help desk case. The delivered default template specifies that the case will be created using the IT Help Desk business unit (*ITHDK*), but this can easily be modified in the template to use any desired business unit.

The system stores the EM alert summary information in the Case Summary field, and adds other information such as target type, metric, and key information in the Case Description field. Based on the business unit setup, the system can also auto-trigger the assignment engine in PeopleSoft CRM upon saving the case so that the case is assigned to the appropriate provider group and agent.

When updating an existing case, the system updates the severity on the HelpDesk case and adds the new EM information into a case note.

The following table lists the HelpDesk case fields which are given values in the delivered sample template when creating a new case.

Note: It is important to remember that these are sample templates provided only as examples, and that you may need to modify them to fit your requirements. Specifically, please note that some values specified here refer to sample data, not system data, and therefore are values that you would need to add to or modify in your production system.

CRM HelpDesk Case Field	Value
Case class	<i>R</i>
DisplayTemplateFamilyCode	<i>RC_HELPDESK</i>
Market	<i>GBL</i>
Vertical	<i>HD</i>
BusinessUnit	<i>ITHDK</i>
AnonymousCaller	<i>Y</i>

CRM HelpDesk Case Field	Value
CaseType	<i>PROBL</i>
Category	<i>NETWO</i>
SpecialtyType	<i>ACCES</i>
CaseSummary	<value of EM <i>Message</i> >
CaseDescription	Based on these values from EM: • <i>EMUser</i> • <i>ConnectorId</i> • <i>Target Type</i> • <i>MetricColumn</i> • <i>MetricName</i> • <i>KeyColumn</i> • <i>KeyValues</i> • <i>Severity</i> • <i>CollectionTime</i> • <i>EventPageURL</i>
Severity	<value of EM <i>SeverityCode</i>> [note: requires CRM setup for Severity value]
Source	<i>EM</i> [note: requires CRM setup for Source value]

When updating a case, the delivered sample template creates a note for the case using the following field values from the EM system:

- *EMUser*
- *ConnectorId*
- *Target Type*
- *MetricColumn*
- *MetricName*
- *KeyColumn*

- *KeyValues*
- *Severity*
- *CollectionTime*
- *EventPageURL*

In the delivered sample template, we also provide entries marked as comments, which list many fields without an assigned value. This lets you know which fields are available for use when creating or updating a case. You can simply un-comment the lines for the fields that you want to use and enter the appropriate values.

View the Case web service definition for more technical information on the available Case fields. You can view the elements and fields that are included in each Case operation message through PeopleTools. Cases are created using the CreateCase service operation, and are updated using the UpdateCase service operation under the web service RC_CASE. Note that these service operations need to be activated as part of the integration setup.

To view a list of field names and aliases for a particular service operation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation.
2. Enter RC_CASE in the Service Operation field and click Search.

The system lists all the service operations that are related to Case.

3. Select the service operation you want to view.
4. Click the **View Message** link in the Message Information area of the page for each message which you want to view .

The system opens the Message Definition page in a new browser.

5. Click the Message Name link under the Parts grid of the Message Definition page.
6. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

Sample Case Created from EM

This is an example of case created from EM:

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

Case 05/29/2009 12:24:30PM PDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220521 **Status** Open - Possible Defect
Employee ID Anonymous **Employee Name**
Summary Memory Utilization is 46.59%#037;; cross... **Contact Method**

Case | Solution (0) | Summary | Notes (0) | Tasks (0) | Case History | Related Cases (0) | ▶

Employee Information

Employee Anonymous Employee
Department Human Resources
Location California Location
Alternate Contact
Asset Department Business Services
Asset Location California Location
Contact Method
Reported By Anonymous Employee

Show Details
Search Again

Case Information

Main | More

☐ Global Case

Quick Code
Case Type Problem
Case Subtype Asset
***Case Status** Open - Poss Defect
☐ Resolved by First Contact
Provider Group Network Operations
Assigned To Erin McCoy
Product Group Network
Product IT1050
Description Intranet
Problem Type Other Problem
Serial Number
Asset Tag
Installed No
[Select Agreement](#)
Error Code
Error Message

Problem Information

***Problem Summary**
Memory Utilization is 46.59%, crossed warning (0) or critical

Description
Case created by EM PeopleSoft Connector

EM User:
ConnectorID:
857992A77DDA41E88440AF586D0DDE4E

Event Information:
Target Type: host
Metric Column: memUsedPct

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

Actions

Suggested Action
Description
Related Actions Go

Category Network Related
Specialty Type Network Access
Detail
Case Priority High
Impact Minor
Urgency Low
Case Severity Warning

Save Case | Find Solutions | Escalate Case | Match Cases

▼ **Audit History**

Created	05/29/2009 11:13AM PDT	By	CVP1
Modified	05/29/2009 11:13AM PDT	By	CVP1

Note that certain values shown in this example (including those for department, location, status, and priority) are derived directly from CRM defaults or configuration rather than from the template or EM data.

Note: When updating cases, the system doesn't override the Case Summary and Description fields. The EM alert summary and other additional information is added, however, as a note for the case.

Setting up Options in PeopleSoft CRM

This topic discusses the following changes made within the PeopleSoft CRM system to enable the integration with Enterprise Manager:

- New source code.
- New severity codes.
- New Enterprise Manager link definition.
- New Enterprise Manager Active Analytics Framework (AAF) action type.
- New policy to create an Enterprise Manager related action.
- Related action changes on the Case page.

Note: Please refer to the appropriate sections in the documentation for additional information on using the Source page, Severity page, Case page, AAF, related actions, link definitions, and web services.

See [Understanding Call Center Prompt Tables](#).

See [Understanding Link Setup](#).

See [Understanding Processing a Case](#).

See “Understanding AAF” (Automation and Configuration Tools).

As you read the rest of this topic keep in mind the following action items that must be completed in order to set up the integration:

- Create a new source code *EM*.
- Create new severity codes *15*, *20*, and *25*.
- Activate *Create Enterprise Manager Related Action* policy.

Also note that to enable the integration you must activate the Case web services operations under the RC_CASE web service.

See *PeopleTools: Integration Broker Service Operations Monitor*

See *PeopleTools: Integration Broker Testing Utilities and Tools*

Note: In addition to these setup items within the PeopleSoft CRM system, remember that you must also deploy and configure the PeopleSoft connector, as described in a later topic in this document.

New Source for Enterprise Manager

PeopleSoft sample data includes a new row in the Source table (PS_RC_SOURCE_TBL) for the IT Help Desk (*ITHDI*) setID to identify Enterprise Manager as a source for creating cases. The data contained in the Source field is EM, and the data contained in the Short Name and Long Description fields is Enterprise Mgr and Enterprise Manager, respectively.

Oracle delivers this information as sample data. You must add corresponding entries for any desired setID's in your production system

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

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

Source

SetID	SHARE	Description	SHARE
Sources Personalize Find First 1-11 of 11 Last			
*Source	*Short Name	Long Description	
CTI	CTI	CTI	
EIP	3rd Party	3rd Party	
EM	Enterprise Mgr	Enterprise Manager	
EMAIL	Email	Email	
FAX	Fax	Fax	
HCM	HCM HR HelpDesk	HCM HR HelpDesk	
MKT	Marketing	Marketing	
OLM	Online	Online	
PHONE	Direct Call	Direct Call	
WEB	Self-Service	Self-Service	
WS	Web Service	Web Service	

* Required Field

Add an entry in the desired setID for the new source code *EM*. Note that this code must match the value for Source field on the trouble ticket template.

New Severity Codes for Enterprise Manager

Oracle's PeopleSoft CRM application provides these severity codes as sample data for the IT HelpDesk (*ITHDI*) setID. Although EM uses many more severity codes, only these codes are used for integration purposes:

- 25 - Critical
- 20 - Warning
- 15 - Clear

Oracle delivers this information as sample data. You must add corresponding entries for any desired setID's in your production system.

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

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

Severity

SetID ITHD1 Description IT Help Desk

Severity Personalize | Find | [?] | [Grid] First 1-7 of 7 Last

*Severity	Self-Service	*Short Name	Self-Service Description	Long Description		
15	☒	Clear	Clear	Clear	+	-
20	☒	Warning	Warning	Warning	+	-
25	☒	Critical	Critical	Critical	+	-
INTER	☒	Intermittent	Intermittent	Intermittent	+	-
ONET1	☒	Onetime Occurrence	Onetime Occurrence	Onetime Occurrence	+	-
RECUR	☒	Recurring	Recurring	Recurring	+	-
REPRO	☒	Reproducible	Reproducible	Reproducible	+	-

* Required Field

Add entries in the desired setID for the three new severity codes (15 = Clear, 20 = Warning, and 25 = Critical).

New Enterprise Manager Link Definition

Oracle's PeopleSoft CRM application includes a new link definition called *Enterprise Manager* under the Link Category *RELA*. This link definition is set up as *Solvable*. It will not be part of any link group; therefore, a user will not be able to perform this related action manually. It is a hidden option that can only be performed automatically by the system.

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

This example illustrates the fields and controls on the Link Definition page (1 of 2).

Link Definition

Link Category RELA Description Related Actions

Version OTH

Links 1-22 of 22

- Change Request - Create New
- Enterprise Manager**
- Case Fraud Workflow
- Sales Lead
- Defect - Create New
- Offer History
- Sales Order
- Change Request - Relate
- Defect - Relate Existing
- Remote Control
- Create RMA
- Service Order
- Case Survey
- Software Delivery

Link Details

*Link Name EM

*Short Name Enterprise Manager

Self-Service Enterprise Manager

Long Description Enterprise Manager

*Status Active

Usage

☐ Default

☒ Solvable

☐ Open in New Window

☐ Self-Service

☐ SetID Enabled

Transfer Details

☐ Portal CREF

Portal Name

Page Name

☐ PeopleCode

Class ID

Class Path

Portal Object Name

Action

Package Tree Viewer

Method Name

Search Keys

*Field Name	Term Name	Select Term
	Term Name	

This example illustrates the fields and controls on the Link Definition page (2 of 2).

The screenshot displays the 'Link Definition' page (2 of 2) in the Oracle's PeopleSoft CRM application. The page is divided into several sections:

- Asset Administrator:** A dropdown menu at the top left.
- Create a New Link:** An orange button.
- Drilldown Details:** A section containing:
 - Navigation:** A text input field.
 - Market:** A dropdown menu.
- Related Object Status Details:** A section containing:
 - PeopleCode:** A radio button selected.
 - Class ID:** A text input field with the value 'PCode'.
 - Class Path:** A text input field with the value 'RC_LINK:APPS_RC'.
 - Method Name:** A text input field with the value 'GetStatus'.
 - Static Value:** A radio button.
 - Static Status:** A dropdown menu.
- Modify System Data:** An orange button.
- Footer:** A section containing:
 - This object is maintained by PeopleSoft.**
 - Created:** 09/22/2006 10:03AM PDT
 - Modified:** 09/29/2006 11:00AM PDT
 - By:** PPLSOFT

New Enterprise Manager AAF Action Type

To create a related action for the Enterprise Manager link definition on the Case page, Oracle's PeopleSoft CRM application delivers the new action type *Case Enterprise Manager*.

This action type can only be triggered from a component interface. You cannot trigger it from PeopleSoft pages. The Case Enterprise Manager action type will not have any design time configuration. It is delivered as system data.

Access the Action Type page (Enterprise Components, Active Analytics Framework, Action Framework, Register Action Type).

This example illustrates the fields and controls on the Register Action Type page.

Register Action Type		Action Type Triggers
Action Type		
Action Type Name	Case Enterprise Manager	
Description	Enterprise Manager Action	
	5 characters remaining	
Long Description	Create Enterprise Manager Related Action	
DesignTime Action Behavior		
Design Time Application Class	Package Tree Viewer	
Design Time Class Path		
Action Text Application Class	Package Tree Viewer	
Action Text Class Path		
	☐ Configuration required	
RunTime Action Behavior		
Run Time Application Class	CaseEnterpriseManager	Package Tree Viewer
Run Time Class Path	RC_AAF_ACTIONS	
	☐ Actions of this type will terminate Active Analytics Framework processing	
	☐ Commit before triggering actions of this type	
	☐ Actions of this type are combinable	
Triggering Environment		
	☐ Can be triggered by application engine	
	☐ Can be triggered by application messages	
	☐ Can be triggered from PeopleSoft pages	
	☒ Can be triggered by component interfaces	
Modify System Data		
This object is maintained by PeopleSoft.		
Date Created	09/06/06 10:39:49.000000AM	PPLSOFT
Last Modified	10/06/06 1:54:12.000000PM	PPLSOFT

This action type is associated with the *After a Helpdesk Case is Saved* trigger point.

New Policy to Create an Enterprise Manager Related Action

Oracle's PeopleSoft CRM application includes a new policy called *Create Enterprise Manager Related Action* for the SHARE setID. This policy is associated with the *After a HelpDesk Case is Saved* trigger point. It is delivered with a status of *In Design*. You must update the status to *Active* if you wish to enable it for the EM integration.

The policy condition uses Enterprise Manager as its source. The policy action uses the Enterprise Manager AAF Action described earlier in this documentation.

Access the Build a Policy page (Enterprise Components, Active Analytics Framework, Policies, Manage Policies).

This example illustrates the fields and controls on the Build a Policy page.

Build a Policy

Policy

Policy Name	Create Enterprise Manager Related Action	Status	In Design
Trigger Point Name	After a HelpDesk Case is Saved	SetID	SHARE
Category Name	Call Center Operational Policies		
Description	Relate Case to Enterprise Manager alert.		

Conditions

IF

Source equals Enterprise Mgr

Edit Condition

Actions

THEN

Add an EM Related Action

Edit Actions

Activate

Activate

Start Date 10/01/2006 **End Date** 11/20/2020

Associated Trigger Points

Trigger Point	SetID
After a HelpDesk Case is Saved	SHARE

Modify System Data

If you use a setID other than SHARE, copy this policy using the desired setID. Remember to activate the policy as part of the setup for the integration.

Related Action Changes on the Case page

The system creates a related action on the case page when a new case is created from Enterprise Manager. The related action summary contains a link that enables the user to transfer to the EM Console.

When a case is updated from Enterprise Manager, the system adds a new note to the case, but does not create a related action.

Access the Related Actions page (Support, Search Cases, Related Actions).

This example illustrates the fields and controls on the Related Actions page.

Related Action Summary				
Customize Find [Icon] First 1 of 1 Last				
Type	Summary	Status	Date Created	Added By
Enterprise Manager	Filesystem D:\ has 88.84% avail...	Clear	09/26/2009 10:55AM PDT	David Perry

To go to the EM Console Metrics Detail page, click the link under the **Summary** field in the **Related Action Summary** section.

Deploying and Configuring the PeopleSoft Connector to the EM Console

To enable the integration, several files need to be copied to the EM Server, and the Peoplesoft connector must be deployed, registered, and configured. This topic discusses:

- Copying the JAR file.
- Deploying and registering the connector.
- Configuring the connector.

Copying the JAR File

PeopleSoft delivers a JAR file (PSFTConnector.jar) that includes the EM Event Model XML, the Peoplesoft Connector Descriptor XML, and the sample template XSLT files mentioned in this documentation for the Peoplesoft connector. Copy the JAR file to EM server oracle home.

Deploying and Registering the Connector

Several Enterprise Manager Command-Line Utility (emctl) commands are used to deploy and register the connector.

Note that the deploying command line shown in this section is applicable for EM 10gR3 and 10gR4. If you are using different version of EM, the command line may be a little different.

To extract the JAR file into \$ORACLE_HOME/sysman/connector/<connector_name_wo_space> directory run this command

```
emctl extract_jar connector <jar_file_name> <connector name> <oracle home>
```

Note: The connector name is the name specified in the connector descriptor XML file. The command replaces the spaces in the connector name with underscores (_) in connector_name_wo_space. For instance, a connector called Peoplesoft Connector will have a directory of Peoplesoft_Connector under the directory of the Oracle home connector. If the Peoplesoft_Connector directory already exists, the extract_jar command will extract files to this directory; otherwise, it will create a new directory called Peoplesoft_Connector and copy files to it.

Register the connector using this command (use the user name *sysman*):

```
emctl register_connector connector <PSFTConnectorDescriptor.xml> <serverName> <port>
<databaseSid> <username> <password> <oracle home>
```

Oracle delivers two templates: The PeopleSoft Sample Template is used to create or update a case. The PeopleSoft Auto-Close Template automatically closes out an open case with a solvable EM action.

Register the shipped ticket templates using this command:

```
emctl register_ticket_template connector <PSFTSampleTicketTemplate.xml> <serverName>
<port> <databaseSid> <username> <password> <connectorTypeName> <connectorName> <templateName> <templateDescription>
```

The `<connectorTypeName>` and `<connectorName>` use the same value: *Peoplesoft Connector*. The `<templateName>` and `<templateDescription>` are quoted strings, which can have spaces in them. The template name and description are displayed on the EM console.

Note: Because the EM connector can only support one active connector, make sure to delete the connector from the console first. After you re-deploy a connector, you need to re-register the templates again even if they have not changed, as the templates are disconnected at the time the connector is deleted.

Configuring the Connector

Once the connector is successfully deployed, you can log in to the EM console to configure the connector. On the configuration page, you can set up:

- *WS end points:* Specify WebService End Points for *createTicket*, *updateTicket* and *getTicket* web service operations.
- *WS credentials:* User ID and password to log in to the PeopleSoft CRM system for adding or updating a case.
- *Web console settings:* A URL that can transfer to the CRM case from the EM system. This is used on the EM metric detail page to drill into the case.
- *Grace period:* A time value that is compared against the data when an alert is cleared to the time when it has transitioned out of clear. If this span of time is greater than the grace period, a new ticket is created for the alert, otherwise, the ticket is reopened. The idea is not to create the case for the same alert within a defined time period.

This example illustrates the fields and controls on the Oracle Enterprise Manager page.

The screenshot shows the Oracle Enterprise Manager 10g Grid Control interface. The top navigation bar includes links for Setup, Preferences, Help, and Logout. The main navigation bar has tabs for Home, Targets, Deployments, Alerts, Compliance, Jobs, and Reports. The left sidebar contains a tree view with categories like Overview of Setup, Roles, Administrators, Notification Methods, Patching Setup, Blackouts, Registration, Passwords, Management Pack Access, Monitoring Templates, Corrective Action Library, Management Plug-ins, and Management Connectors (which is highlighted). The main content area is titled 'Management Connectors' and includes a description: 'A Management Connector is a component that integrates different enterprise frameworks into the Enterprise Manager Console. This page lists the available connectors. In order to use them on your system, they must be configured.' Below this is a table with columns: Select Name, Version, Description, Configured, and Configure. The table lists one connector: 'Peoplesoft Connector' with version '1.0.0.0.0' and description 'Peoplesoft integration with EM'. The 'Configured' column shows a green checkmark, and the 'Configure' column has a pencil icon. A 'Delete' button is at the top left of the table, and 'Previous' and 'Next' buttons are at the top right. The page footer indicates 'Page Refreshed Sep 6, 2006 4:02:23 PM'.

Select *Peoplesoft Connector* from the Oracle Enterprise Manager page and then click the **Configure** button to access the following page. Use the Configure Management Connector page to enter URLs for the WebService End Points. You can also add a user name and password and enter web console settings (machine and port and database name).

This example illustrates the fields and controls on the Configure Management Connector: Peoplesoft Connector (General Tab).

The screenshot shows the 'Configure Management Connector: Peoplesoft Connector' page, specifically the 'General' tab. The page has a header with 'General' and 'Ticket Templates' tabs. The main section is titled 'Connection Settings' and includes a description: 'Enter a set of administrator credentials and the webservice end points for relevant operations of the ticketing system. These are required for communications.' Below this is a table for 'Web Service End Points' with columns 'Operation' and 'Web Service End Point (URL)'. The table lists three operations: 'createTicket', 'getTicket', and 'updateTicket', all with the same URL: 'http://rtas094.us.oracle.com:8000/PSIGW/PeopleSoftServiceListeningConnector/C910R70B'. Below the table is a tip: 'TIP Replace <midtier-server> and <servername> in the above URLs with the midtier server and server of your Ticketing System. If you have customized the webservice, you may need to change the webservice operations at the end of the URL.' Below the tip are input fields for 'User Name' (containing 'HELPMGR'), 'Password' (masked with dots), and 'Ticket Number' (empty). Below these is a note: 'Enter a valid ticket number from the ticketing system to test connection to this system.' The next section is titled 'Web Console Settings' and includes a description: 'If you're using a web console, you can enable the connector to provide URL links to the ticket on the metric details page and vice versa.' Below this is a checkbox labeled 'Enable web console features' which is checked. Below the checkbox are input fields for 'machine and port' (containing 'rtas094.us.oracle.com:84') and 'database name' (containing 'c910r70bnt').

The Ticket Template page lists all registered templates for the connector.

This example illustrates the fields and controls on the Configure Management Connector: Peoplesoft Connector (Ticket Template Tab).

ORACLE Enterprise Manager 10g

Grid Control

Home Targets Deployments Alerts Compliance Jobs Reports

Enterprise Manager Configuration | Management Services and Repository | Agents

Configure Management Connector:

Cancel Ok

General Ticket Template

Ticket templates are XSLT files based upon provided XML schemas of the Enterprise Manager Alert model and the Trouble Ticketing System model. Templates are used to construct tickets in the context of an Enterprise Manager Alert. Templates must be loaded through emctl. This page lists the currently registered templates.

Delete

Select Name	Description
☒ Sample Ticket Auto Close	Sample Ticket Auto Close Template
☐ Sample Ticket	Sample Ticket Template

Set up your desired rules to use the registered template to create a case in the HelpDesk system.

This example illustrates the fields and controls on the Notification Rules: View Notification Rule page.

ORACLE Enterprise Manager 10g

Grid Control

Home Targets Deployments Alerts Compliance Jobs

Setup Preferences

Preferences

Notification Rules >

View Notification Rule: Testing Case Integration EM

This summarizes how and when Enterprise Manager will send notifications for this rule.

General

Owner: EMSUPER
Description: Public
Target Type: Host

Targets

All targets of type Host

Availability

Agent Unreachable: No
Agent Unreachable Resolved: No
Blackout Started: No
Blackout Ended: No

Metrics

Metric	Objects	Severity States	Corrective Action States	
			On Critical	On Warning
CPU Utilization (%)	n/a	Critical, Warning, Clear		
Memory Utilization (%)	n/a	Critical, Warning, Clear		

Policies

Policy	Category	Severity States	Corrective Action States
No policies selected			

Jobs

Job Type	Job Name	Job Owner	Job Status
No jobs selected			

Methods

E-mail Notification

No e-mail will be sent.

Advanced Notification Methods

Name	Type	Description
PSFTSampleTicketTemplate.xml	Java Callback	This notification method is used by the TTCconnector

Once a case is created or updated, the user can drill into case from the EM Metric Detail page

This example illustrates the fields and controls on the Alert History page.

Alert History

Comment for Most Recent Alert

Add Comment

Severity	Timestamp	Message	Last Comment	Details
	Jun 16, 2009 7:12:11 PM	Memory Utilization is 44.01%, crossed warning (100) or critical (0) threshold.	Ticket 220652 was updated.	
	Jun 16, 2009 6:20:16 PM	Memory Utilization is 43.8%, crossed warning (0) or critical (100) threshold.	Ticket 220652 was created.	
	Jun 12, 2009 9:18:25 PM	Memory Utilization is 41.89%, fallen below warning (99) and critical () thresholds.	-	-

TIP Click on the details icon for user comments and system notifications.

Related Links

[Acknowledge Metric and Policy Settings](#)

[Compare Targets](#)

[Create/View Ticket](#)

Home | **Targets** | Deployments | Alerts | Compliance | Jobs | Reports | Setup | Preferences | Help | Logout

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[About Oracle Enterprise Manager](#)

Please refer to Enterprise Manager documentation for additional information on using the EM Console and the Alert History page.

Delivered Active Analytics Framework System Data for Call Center Applications

Delivered Terms

PeopleSoft CRM delivers a variety of terms that you can use to build policies for your call center applications. They are categorized by subject areas using a folder structure. To facilitate term lookup when building a policy or creating a correspondence template, the system displays a term selection page.

There are over 100 terms in the Case Details folder. The following list is a small subset of all of the delivered terms. These terms are typically used when building policies that impact the PeopleSoft Support and HelpDesk applications:

<i>Subject Area</i>	<i>Term</i>	<i>Description</i>
Business Processes	Case Sample Worklist Operator ID	Returns the operator ID of the sign-on user as a string.
Case Sample Structured Worklist Rowset	Returns the operator ID of the sign-on user as a rowset.	
Case Details	Case ID	Returns the ID of the case.
Case Restore Minutes	Returns the number of minutes, based upon the entitlements, within which the case should be completed.	
Case Response Met Date	Returns the date the agent responded to the problem associated with the case.	
Case Restore Met Date	Returns the date the technician restored service or fixed the problem associated with the case.	
Account Number Specified in Case	Returns the account number specified on the case.	
Site Identification Number	Returns the site identification number or SIN.	

Subject Area	Term	Description
Case Notes Details	Returns the details from the notes that were entered for a case.	
Case Status Category	Returns the case status category.	
Case Agreement Warranty	Returns the warranty name associated with the case.	
Case Agreement Line	Retrieves the case agreement line for a specific case.	
Asset Tag	Returns the asset number of the installed product.	
Serial ID	Returns the serial ID of the product that is entered on the case.	
Person PIN	Returns the personal identification number or PIN of the employee associated with the case.	
BO_ID of Case Reported By	Returns the business object ID of the contact person who reported the case.	
BO_ID of the Customer Reporting the Case	Returns the business object ID of the customer reporting the case.	
Role Type ID of the Customer Reporting the Case	Returns the role type ID of the customer reporting the case.	
Role Type ID of the Contact Reporting the Case	Returns the role type ID of the contact reporting the case.	
BO_ID of the Site Reporting the Case	Returns the business object ID of the site reported on the case.	
BO_ID of the Contact Reporting the Case	Returns the business object ID of the contact reporting the case.	
Work Order Description Change	Returns the description of the work order.	
Link Definition	Select a Solution <SOLUTION_ID>	Allows users to select a solution.
Select a Business Project<BP_ID>	Allows users to select a business project.	

Subject Area	Term	Description
Select a Branch Script <SCRIPT_ID>	Allows users to select a branch script.	
Select a Dialog Business Unit <BUSINESS_UNIT>	Allows users to select a business unit under which their dialogs would reside.	
Select a Dialog ID <DIALOG_ID>	Allows users to select a dialog ID.	
Select an External Event Trigger <EXT_EVENT_TRIGGER>	Allows users to select an external event.	
Notification Delay	<Percentage> Restore Minutes	Used to specify the percentage of entitled restore time when a notification can be sent.
<Percentage> Response Minutes	Used to specify the percentage of entitled response time when a notification can be sent.	
Case Metrics	Number of Priority <PRIORITY> Cases	Returns the number of priority cases.
RMA Details	RMA Business Unit	Returns the RMA Business Unit.
RMA ID	Returns the RMA ID	

PeopleSoft CRM Call Center Reports

PeopleSoft CRM Call Center Reports: A to Z

The tables in this topic list the PeopleSoft Support and PeopleSoft HelpDesk reports, sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft.*
- *PeopleTools: SQL Language Reference for PeopleSoft*

For samples of these reports, see the [Report Samples](#) that are published with this online documentation.

This topic discusses:

- PeopleSoft HelpDesk case reports.

Except for report *RCC2009*, all HelpDesk-specific report IDs start with *RCC1*

- PeopleSoft Support case reports.

All Support-specific report IDs start with *RCC2*.

- Solution reports (shared by both applications).

Solution report IDs start with *RCC2*.

Note: For most reports the query name and report name are the same. If the query name is different, it appears in the Report ID and Report Name column. Unless otherwise noted, the from date and through date for the cases included in a report refer to the case creation date.

PeopleSoft HelpDesk Reports

Report ID and Report Name	Description	Navigation	Run Control Page
RCC1002 HelpDesk Cases By Agent	This report categorizes cases according to the agents to whom the case is assigned. For each case, the report shows the case ID, status, priority, contact name, date created, and subject.	HelpDesk > Reports > Case By Agent > HelpDesk Case By Agent	RUN_RCC1002
RCC1003 HelpDesk Cases By Department	This report lists the departments that have reported cases. For each department, the report shows the number of cases reported.	HelpDesk > Reports > Case By Department > HelpDesk Case By Department	RUN_RCC1003
RCC1004 HelpDesk Case By Priority (RC_CASES_BY_PRIORITY)	This report provides a list of cases ordered by priority and gives the total number of cases for each priority. For each case, the report shows the priority, case ID, status, department, reported by, date created, and assigned to agent.	HelpDesk > Reports > Case By Priority > HelpDesk Case By Priority	RUN_RCC1004
RCC1005 HelpDesk Cases By Type	This report provides a list of cases categorized and subtotaled by case type. For each case, the report shows the case ID, priority, status, caller name, date created, and assigned to.	HelpDesk > Reports > Case By Type > HelpDesk Case By Type	RUN_RCC1005
RCC1006 HelpDesk Cases By Status	This report lists case statuses and gives the number of cases with each status.	HelpDesk > Reports > Case By Status > HelpDesk Case By Status	RUN_RCC1006
RCC1007 HelpDesk Case By Category/Type/Detail (HDBYCATETYDET)	This report groups cases by category and provides the total number of cases for each category. For each case, the report shows the case ID, category, type, detail, creation date, caller name, status, and summary.	HelpDesk > Reports > Case By Category/Type/Detail > HelpDesk Case By Category/Type/Detail	RUN_RCC1007
RCC1008 HelpDesk Case Information	This report provides detailed information for cases, including most of the data shown in the case component.	HelpDesk > Reports > Case Information > HelpDesk Case Information	RUN_RCC1008

Report ID and Report Name	Description	Navigation	Run Control Page
RCC1009 HelpDesk Cases Status By Agent	This report lists agents to whom cases have been assigned. For each agent, the report shows the agent's ID and name and the number of open cases for that agent in total and broken out by case status.	HelpDesk > Reports > Case Status By Agent > HelpDesk Case Status By Agent	RUN_RCC1009
RCC1010 HelpDesk Time To Close By Agent (RC_CLOSEBYAGENT)	This report lists agents who have been assigned cases. For each agent, the report shows the agent's ID and name, a list of the agent's closed cases, the total number of cases closed, and the average number of days to close. The case shows the case ID, priority, date opened, date closed, and days to close.	HelpDesk > Reports > Time To Close By Agent > HelpDesk Time To Close By Agent	RUN_RCC1010
RCC1011 HelpDesk Cases By Employee	This report lists employees who have reported cases. For each employee, the report shows the number of cases opened.	HelpDesk > Reports > Case By Employee > HelpDesk Case By Employee	RUN_RCC1011
RCC1012 HelpDesk Cases by Business Project	This report lists business projects that have been used in cases. For each business project, the report shows the number of cases where the business project was used.	HelpDesk > Reports > Case By Business Projects > HelpDesk Case By Business Projects	RUN_RCC1012
RCC2009 HelpDesk Employees With Case	This report lists employees who opened cases during the specified time period. For each employee, the report provides a name, location, department, telephone number with extension, and email address. No case information appears on this report.	HelpDesk > Reports > Employees with Case > HelpDesk Employees With Case	RUN_RCC2009

PeopleSoft Support Reports

Report ID and Report Name	Description	Navigation	Run Control Page
RCC2000 Agreement Type Statistics (RCC_3007)	This report provides statistics for agreements used during a specified date range, including the number of cases opened, the number of cases closed and the average time to close in days and in hours.	Support > Reports > Agreement Statistics > Agreement Statistics	RUN_RCC2000
RCC2001 Case Information	This report provides detailed information for cases, including most of the data shown in the case component.	Support > Reports > Support Case Information > Case Information	RUN_RCC2001
RCC2002 Case by Age	This report categorizes cases by creation date and then by customer. For each case, the report shows the case ID, priority, status, case type, contact name, assigned to agent, and subject.	Support > Reports > Cases By Age > Cases By Age	RUN_RCC2002
RCC2003 Cases by Agent (RC_CASESBYAGENT)	This report lists agents to whom cases have been assigned. For each agent, the report shows the agent's name and the number of cases assigned to the agent, opened by the agent, and closed by the agent. The report also provides the average time to close (in days and hours) for cases that the agent closed.	Support > Reports > Cases By Agent > Cases By Agent	RUN_RCC2003
RCC2004 Cases by Customer	This report categorizes cases by customer. For each case, the report shows the case ID, priority, status, product ID, case type, contact name, date created, assigned to agent, and subject.	Support > Reports > Cases By Customer > Cases By Customer	RUN_RCC2004
RCC2005 Cases by Priority	This report categorizes cases by priority and status, then by customer. For each case, the report shows the case ID, case type, date created, and subject.	Support > Reports > Cases By Priority > Cases by Priority	RUN_RCC2005

Report ID and Report Name	Description	Navigation	Run Control Page
RCC2006 Cases by Product	This report categorizes cases by product. For each case, the report shows the product ID, case ID, priority, status, case type, contact name, date created, assigned to agent, and subject.	Support > Reports > Cases By Product > Cases by Product	RUN_RCC2006
RCC2007 Cases by Type	This report categorizes cases by case type. For each case, the report shows the case ID, priority, status, contact name, date created, assigned to agent, and subject.	Support > Reports > Cases by Type > Cases By Type	RUN_RCC2007
RCC2008 Cases Reopened	This report lists cases that have been reopened. For each case, the report shows the case ID, the date the case was reopened, and the user who reopened the case. Note: This report requires that the Case Re-Opened policy be activated in the Predictive Analytics Framework definition.	Support > Reports > Cases Reopened > Cases Reopened	RUN_RCC2008
RCC2013 Support Agreement Usage	This report lists agreements that have been associated with cases. Agreements are categorized by customer. For each agreement, the report shows the agreement code, the start date, the end date, and the number of cases that are associated with that agreement.	Support > Reports > Support Agreement Dates > Support Agreement Dates	RUN_RCC2013

Related Links

“Understanding AAF” (Automation and Configuration Tools)

Solution Reports

Report ID and Report Name	Description	Navigation	Run Control Page
RCC2012 Solutions Usage	This report lists solutions that were used in cases created during the specified date range. For each solution, the report shows the solution usage count, solved count, and success rate.	Solutions > Reports > Solutions Usage > Solutions Usage	RUN_RCC2012
RCC2014 Top Ten Solutions by Product	For each included product, this report lists the ten solutions that most often resolved cases that were created during the specified date range. For each solution, the report shows the number of cases solved for that product.	Solutions > Reports > Top Ten Solutions by Product > Top Ten Solutions by Product	RUN_RCC2014