PeopleSoft®

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook

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PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook
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About This PeopleBook

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

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

See *About These PeopleBooks,* "ISO Country and Currency Codes," ISO Country Codes.

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix D, "ISO Country and Currency Codes," ISO Currency Codes.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

	you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

PeopleSoft Enterprise CRM Call Center Applications Preface

This preface discusses:

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

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

PeopleSoft Application Fundamentals

The *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook* provides implementation and processing information for your PeopleSoft Support and HelpDesk applications. However, additional essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook.* Each PeopleSoft product line has its own version of this documentation.

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*.

PeopleSoft Enterprise CRM Call Center Applications

The *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook* discusses three distinct applications to provide complete call center management for your internal and external customers:

- PeopleSoft Enterprise Support manages your customer support operations.
- PeopleSoft Enterprise HelpDesk manages your workforce support operations.
- PeopleSoft Enterprise HelpDesk for Human Resources manages HR related inquiries and issues.

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

In this book, the term *call center* always refers to PeopleSoft Enterprise Support, HelpDesk (IT), and HelpDesk for Human Resources.

PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to your application PeopleBook.

There are three parts to the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook:*

- Correspondence management.

  This part discusses manual notifications and correspondence requests.

- Automation tools.

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

- Configuration tools.

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

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “PeopleSoft CRM Automation and Configuration Tools Preface”.

PeopleSoft CRM Services Foundation

The *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Enterprise Integrated FieldService, Order Capture, and the call center applications.

There are three parts to the *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook:*

- Solution management.

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

- Transaction Billing Processor Integration.

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

- Environmental Systems Research Institute (ESRI) integration.

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

See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook.*

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the Enterprise PeopleTools 8.45 PeopleBook.

PART 1

Setup

Chapter 1
Getting Started with PeopleSoft Enterprise CRM Call Center Applications

Chapter 2
Defining Call Center Business Units and Display Template Options

Chapter 3
Setting Up Call Center Prompt Tables

Chapter 4
Setting Up RMA Processing

Chapter 5
Setting Up Links to PeopleSoft HRMS Pages and Related Actions

Chapter 6
Setting Up Change Management

Chapter 7
Defining EIP Options for Integration to PeopleSoft HRMS

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM Call Center Applications

This PeopleBook describes the three PeopleSoft Customer Relationship Management (PeopleSoft CRM) call center applications: PeopleSoft Enterprise Support, HelpDesk, and HelpDesk for Human Resources. Although these applications differ in ways that optimize them for their specific purposes, they all share the same basic case-related architecture.

This chapter provides an overview of PeopleSoft Enterprise CRM call center applications and:

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

PeopleSoft Enterprise CRM Call Center Applications Overview

PeopleSoft Enterprise CRM 8.9 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 CRM self-services applications, they can access information that can help them solve their problems online without intervention from an agent.

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

- PeopleSoft Enterprise Support enables you to manage your customer support operations.
- HelpDesk enables you to manage your workforce support operations.
- HelpDesk for Human Resources enables you to manage employee human resources inquiries and issues.

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.

Note. This PeopleBook documents all of the call center applications. Common functionality is documented once, and differences between the applications are clearly marked. Throughout this book, references to *call center functionality* indicate that the functionality is common to all call center applications.

PeopleSoft Enterprise CRM Call Center Business Processes

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

Business Processes for All Call Center Applications

All three call center applications 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 by using text searches. You can search for and view defects, and enhancements.
- Track both successful and unsuccessful attempts to resolve cases.
- Embed service 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.
- Manage work using structured task lists known as business projects.
- Use troubleshooting scripts and customer satisfaction scripts to gather information from callers.
- Assign system access to users by role using authentication tokens.
- Invoice customers for services rendered, regardless of whether or not a service agreement is in place.
- Associate service-level agreements with HelpDesk cases to gain insight into performance against targeted service levels and related agreements.
- Use reports and charts to analyze and manage overall call center operations.

PeopleSoft Enterprise Support Business Processes

PeopleSoft Enterprise Support enables you to:

- Access the 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 or not a service agreement is in place.
- Run lead qualification (upsell and cross-sell) scripts and generate new sales leads and orders from a case.

- Relate cases to defects using PeopleSoft Enterprise Quality Management.
- Use smart views, reports, and charts to analyze and manage overall call center operations.

PeopleSoft Enterprise HelpDesk Business Processes

PeopleSoft Enterprise HelpDesk enables you to:

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

PeopleSoft Enterprise HelpDesk for Human Resources Business Processes

PeopleSoft Enterprise HelpDesk for Human Resources also enables you to:

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

PeopleSoft Enterprise CRM Call Center Integrations

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

Integration with Other CRM Applications

The 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, process flows can move smoothly from application to application without the need for integration-specific configuration.

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

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

Call Center applications integrate with these PeopleSoft Enterprise products:

- FieldService
- Sales

- Real-Time Advisor
- Order Capture
- Change Management
- Quality Management
- Contracts

Integration with External Systems

Customer, worker, product, and Business Analysis Modeler integrations are common to multiple PeopleSoft CRM applications. The call center applications support the following additional integration points:

- Integration with PeopleSoft Enterprise Supply Chain Management or similar systems enables you to generate return material authorizations (RMAs) in PeopleSoft Support for customers returning stock for replacement or repair or that was shipped in error.
- The Credit Card enterprise integration point (EIP) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support.
- Real-time EIPs for HelpDesk for Human Resources enable you to view relevant human resources data 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.
- 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.
- The Case EIP enables integration with a separately licensed Natural Language Processing search engine, which permits advanced searching of solutions in the knowledge base, increasing agent and technician efficiency and problem-solving accuracy.
- Through the Case EIP, third-party IT asset management applications launch IT asset discovery and desktop remote control from HelpDesk.
- The Systems Management integration framework provides a mechanism for integrating third-party network management applications.
- Integration with PeopleSoft Enterprise Contracts or any third-party billing application to allow the invoicing of agreement-based service orders as they are generated during a support call.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” EIPs in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Understanding Business Object Relationship Model Components”

PeopleSoft Enterprise Call Center Applications Implementation

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

PeopleSoft Enterprise call center applications also provides 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 all of the components that have component interfaces:

Component	Component Interface	References
RC_CASE_TYPE	RC_CASE_TYPE_SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RC_CA_TY_DE	RC_CA_TY_DE_SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RC_PRIORITY	RC_PRIORITY_SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RC_PROBTYPE	RC_PROBTYPE_SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RC_SEVERITY	RC_SEVERITY_SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RC_STATUS	RC_STATUS _SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RC_QUICK_CODE	RC_QUICK_CODE _SCI	See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.
RBT_TGUIDE_SETUP	RBT_TGUIDE_SETUP_SCI	See Chapter 14, "Configuring Self-Service Applications," Configuring Troubleshooting Guide , page 227.
RC_SOLN_LIB_SETUP	RC_SOLN_LIB_SETUP_SCI	See Chapter 14, "Configuring Self-Service Applications," Configuring Troubleshooting Guide , page 227.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook,* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface"

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9

CHAPTER 2

Defining Call Center Business Units and Display Template Options

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

• Define call center business units.

• Define display template general 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, and call center reporting and analysis is based on business units. You can configure different business units for different business processing.

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

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

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Working with Business Units and TableSet Controls," Understanding TableSet Controls in PeopleSoft Enterprise CRM.

Understanding Display Templates

Display templates enable you to control the appearance and behavior of the Case component (RC_CASE) for various yet specific business needs at ease.

The Case component (RC_CASE) can be associated with multiple display templates, each of which provides a different presentation of the component tailored for specific needs. Suppose that you set up three display templates for the Case component to be used in the customer support center, the internal IT helpdesk, and the internal human resources helpdesk. You can configure how the component looks and behaves in each operation based upon business requirements. For example, you can disable the Billing page for the two helpdesk display templates if interdepartmental billing is not available, change the Customer Information section label to Employee Information for the helpdesk 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.
- Visibility of page sections. You cannot, however change the order of the sections.
- Visibility and security of page fields.
- Functionality and setup options that are initiated by display templates.
- The default pages to display when users access the component in the add mode or update mode.
- Labels on fields, sections, and tabs within sections.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates,” Configuring Display Templates for Components.

Understanding Assignment Options

There are two sections on the Options page: Agent and Self-service.

Each section has options for provider group assignment and for agent assignment.

Note. In addition to the options here, you can also 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 takes precedence: the system will first attempt to assign cases based on the setting here in the Business Unit - Options page. Only if that attempt fails does the system assign the case to the default Assign To provider group that is specified on the Case Defaults page.

This section discusses:

- Provider group assignment.
- Person assignment.

Assigning Provider Groups

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

None

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

Note. Delivered Active Analytics Framework (AAF) for cases sends 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 those cases

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Any

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

If *Any* is selected, the assignment engine does not look at worker or provider group schedules; it simply 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.

Available

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

If *Available* is selected, the assignment engine looks only at workers and provider groups who are currently available according to the schedules you create.

Default

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

If *Default* is selected, the system will address whether there is agent that is on the case. If there is an agent on the case, and that agent is in one and only one provider group, the system will assign that provider group to be the *Default* provider group. Otherwise, the provider group field is left blank.

In other words, selecting *Default* forces the system to find the group for the agent that has already been selected. If the agent is a member of more than one group, the Provider Group field will be left blank.

Note. This option is available only for cases created by agents, not for cases created by self-service application users.

Assigning a Person to a Case

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.

None

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

Note. Be aware that delivered Active Analytics Framework (AAF) for cases sends 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 those cases.

Any

Select to have the assignment engine assigns the case to the person with the highest fit score if a provider group was previously entered, either manually or through auto-assignment.

If no provider group was entered, then no agent is assigned.

Available

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

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

Default

Select to have the system assign the case to the agent who created the case. 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 additionally assigns the case to the agent's provider group (assuming that one can be uniquely identified).

Note. This option is only available for cases created by agents, not for cases created through a self-service application.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up and Performing Assignment Searches”.

Defining Call Center Business Units

This section discusses how to:

- Create a call center business unit.
- Define business rules for a call center business unit.
- Set up call center components and their defaults.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Business Units and TableSet Controls”

Prerequisites

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

Before you can set case defaults for a call center vertical, such as CRM for Communications, you must set up the default values in the appropriate call center prompt table.

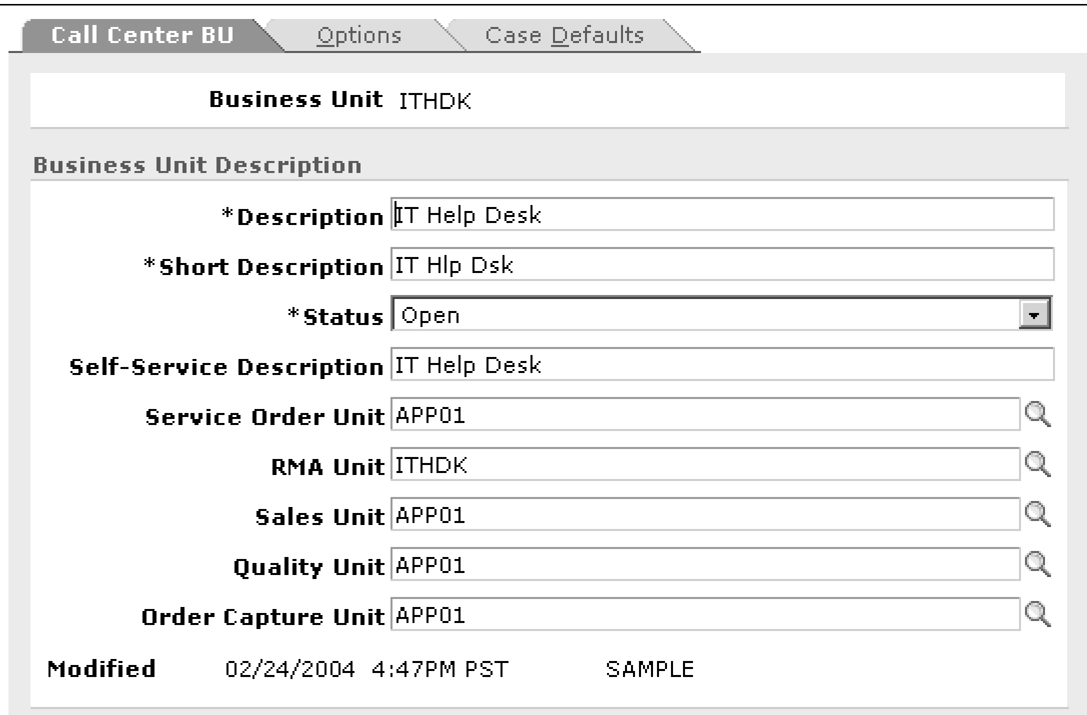
Pages Used to Define Call Center Business Units

Page Name	Object Name	Navigation	Usage
Call Center BU	BUS_UNIT_RC1	Set Up CRM, Business Unit Related, Call Center Definition, Call Center BU	Create call center business units and establish default business units to use when integrating with other PeopleSoft applications.
Business Unit - Options	BUS_UNIT_RC2	Set Up CRM, Business Unit Related, Call Center Definition, Options	Define business rules for a call center business unit.
Case Defaults	BUS_UNIT_RC_DEF	Set Up CRM, Business Unit Related, Call Center Definition, Case Defaults	Set up defaults for all call center applications.

Creating a Call Center Business Unit

Access the Call Center BU page.

The preceding screen shot shows the page in Add a New Business Unit mode. In add mode, the other pages in the component are hidden and several fields are not available for entry.



Call Center BU page

The preceding screen shot shows the page in Add a New Business Unit mode. In add mode, the other pages in the component are hidden and several fields are not available for entry.

Establishing the Business Unit

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

Short Description Enter the description that appears on the Case page and other places where the business unit appears.

Default SetID 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.

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.

Note. They system will always create a setID that is equal to the business unit that you create—every business unit is also a setID.

Status Indicates the call center status. Values are: *Open* (active) or *Closed* (inactive). No transactions are processed for a closed business unit.

Create BU (create business unit) Click to establish the tableSet controls for the call center business unit based on the default setID that you specify.

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

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

Specifying Related Business Units

These 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 Actionssection on the case page, the Related Actions section on the Case Summary page, or from the Related Actions page on the Case component.

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

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

RMA Unit Enter the default RMA business unit to use when creating an RMA from a case.

Service Order Unit Enter the default FieldService business unit to use when creating a service order from a call center case. 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.

Sales Unit Enter the default Sales business unit 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 selecting a defect to relate to a case.

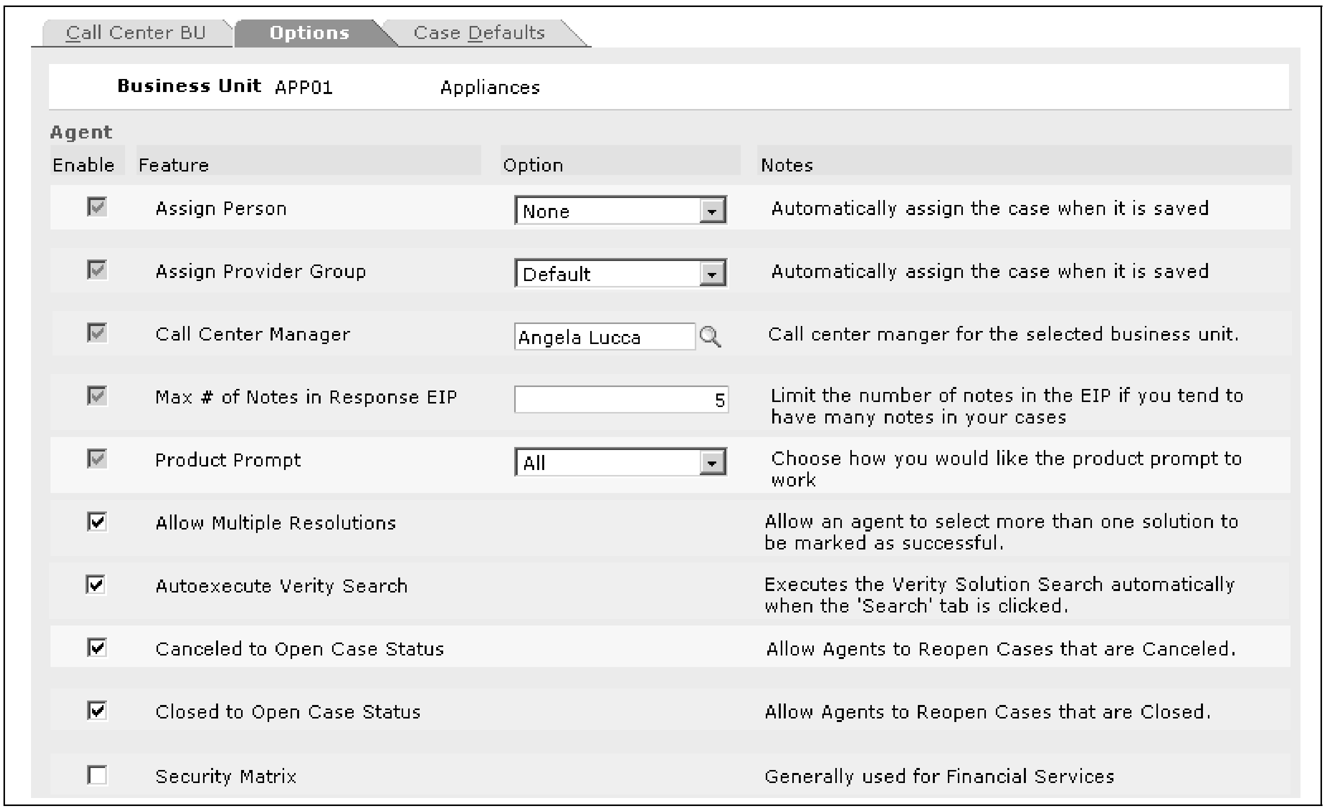
Order Capture Unit (business unit for order capture)

Enter the default Order Capture business unit to use when entering an order related to a case.

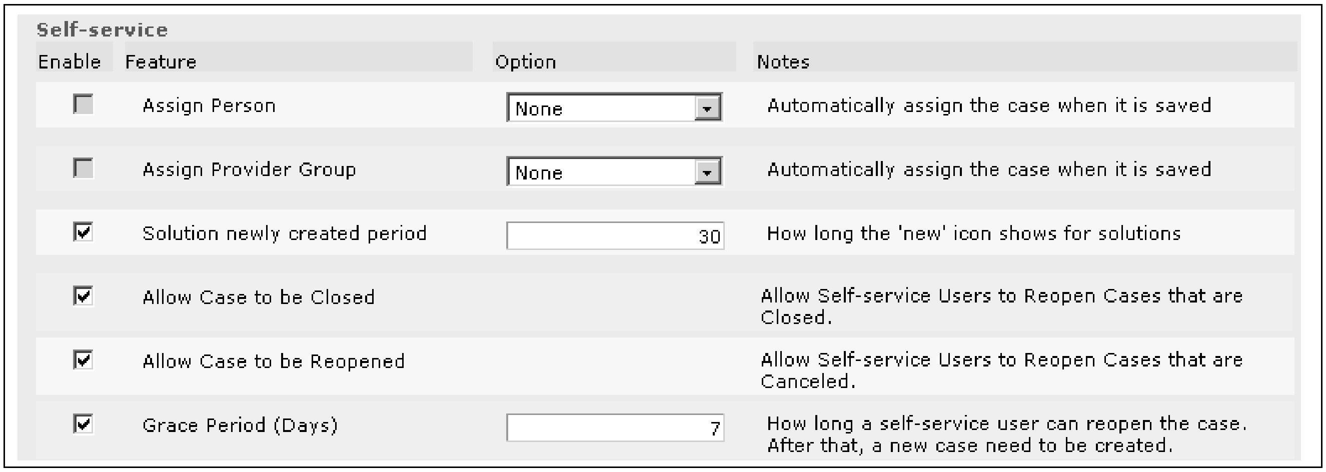
Note. If you use a lead qualification script to transfer to Order Capture from the Support or HelpDesk Case component, the business unit must be valid for your Order Capture application, or you must select a default order capture business unit on this setup page.

Defining Business Rules for a Call Center Business Unit

Access the Business Unit - Options page



Business Unit – Options page (1 of 2)



Self-service

Enable	Feature	Option	Notes
☐	Assign Person	None	Automatically assign the case when it is saved
☐	Assign Provider Group	None	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 Reopen Cases that are Closed.
☑	Allow Case to be Reopened		Allow Self-service Users to Reopen Cases that are Canceled.
☑	Grace Period (Days)	7	How long a self-service user can reopen the case. After that, a new case need to be created.

Business Unit – Options page (2 of 2)

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

Agent Options

Assign Person

Select how agents are assigned the case.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Assigning a Person to a Case, page 11.

Assign Provider Group

Select how agents are assigned the case.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Assigning a Person to a Case, page 11.

Call Center Manager

Select your default call center manager. This can be used to route workflow using Active Analytics Framework (AAF).

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Setting Up PeopleSoft CRM Workflow".

Max # of Notes in Response EIP

Enter a number that limits the number of notes sent in the EIP in response to a requesting entity. If you leave this field blank, all notes are included.

Product Prompt

Choose how you would like the product prompt to work. The options are:

- *All*

  You can select a product from the master products table.

- *FSI*

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

- *Installed*

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

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products.

Allow Multiple Resolutions

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

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

Canceled to Open Case Status Select to allow agents to reopen cases that are cancelled.

Closed to Open Case Status Select to allow agents to reopen cases that are closed

Security Matrix Generally used for Financial Services.

Self-Service Options

Assign Person Select how agents are assigned the case.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," Assigning a Person to a Case, page 11.

Assign Provider Group Select how provider groups are assigned the case.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook,* "Setting Up and Maintaining Provider Groups and Group Members".

Solution Newly Created Period Specify how long (in days) the "new" icon appears for solutions.

Allow Case to be Closed Select to allow self-service application users to reopen cases that are closed.

Allow Case to be Reopened Select to allow self-service application users to reopen cases that are cancelled.

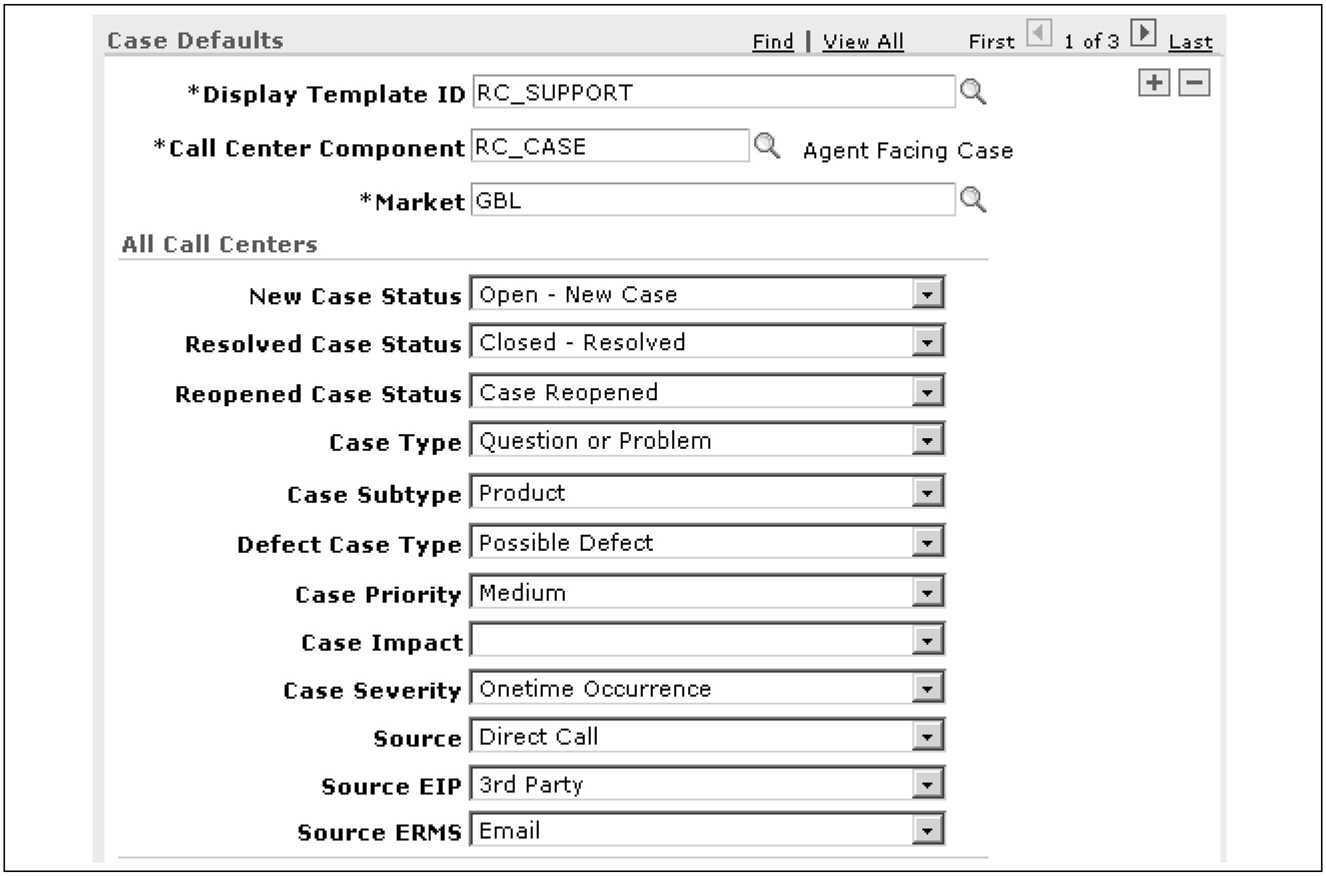
Grace Period (Days) Enter the number of days after a case has been closed during which self-service application users are permitted to reopen the case. This option is only allowed if you select the previous option — allowing a case to be reopened. If you allow cases to be reopened, the grace period will default to*7* days.

See Also

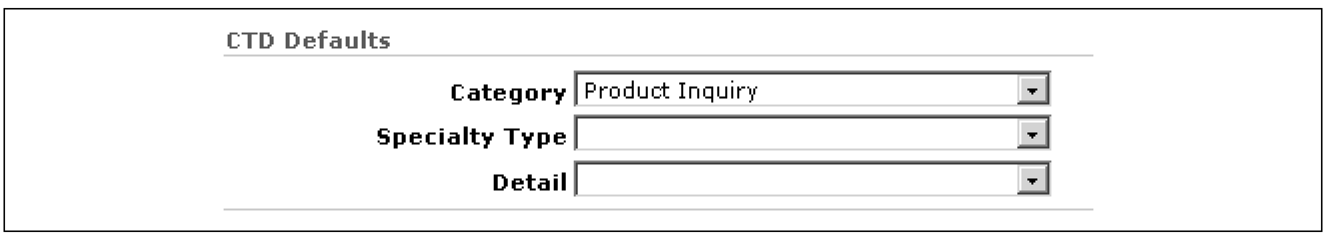
PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls," Understanding TableSet Controls in PeopleSoft Enterprise CRM

Setting Up Case Defaults

Access the Case Defaults page.



Case Defaults page (1 of 2)



Case Defaults page (2 of 2)

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

Case Defaults

Display Template ID Select the display template to be used for this business unit.

Call Center Component Select the component that will be associated to the display template that is specified in the previous field. You can setup different defaults for different components on the same template and you can setup different default values for different templates that use the same business unit.

Market Select *Global*.

All Call Centers

New Case Status The status that the system sets when a user 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, a user reporting a case through a self-service application cannot set the case status.

Resolved Case Status The status that is set when a user identifies a successful solution. Enter a value here to enable the system to close cases once they are resolved.

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

Reopened Case Status If you selected the Allow Case to be Reopened check box (on the Business Unit - Options page), enter the status that is to be used for cases that self-service application users reopen. If you do not enter a status here, then, when an agent or self-service user reopens a case, the status will not change. This could result in cases being closed without having a successful resolution—a condition that the system does not normally allow.

Default Case Types

Case Type Select the default case type for a new case.

Case Sub Type Select the default case subtype for a new case.

Defect Case Type The case type that the system sets when a user relates a case to a Quality Management defect. If you do not enter a value, the case type does not change when the case is related to a defect.

Note. This function is not active in this release (8.9).

Case Priority Select the default case priority for a new case.

Case Impact The default case impact for a new case.

Case Severity Select the default case severity for a new case.

Source Select the default source for the case. This allows you to tell which cases were entered by way of Self-Service applications or by the agent.

Source EIP Select the default source for a case that is created by way of the Case EIP.

See Appendix A, “Integrating the Case with Third-Party Systems,” Understanding the Case EIP, page 255.

Source ERMS Select the default source for a case that is created by way PeopleSoft CRM’s ERMS system.

See *PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook*, “Understanding ERMS”.

CTD Defaults

Category Select the default case category for a new case.

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

Detail Select the default case detail for a new case.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," page 29

Defining Display Template General Options

This sections discusses how to use display templates to enable pages and define general options for the Case component.

Display templates are unique identifiers that define how to display pages, sections, and fields within controlled components. In PeopleSoft call center applications, display templates control the look and feel of the Case page. The Case component can be associated with multiple display templates, each of which provides a different presentation of the component tailored for specific needs. Suppose you set up three display templates for the Case component (RC_CASE) to be used in the customer support center, the internal IT helpdesk, and the internal human resources helpdesk. You can configure how the component looks and behaves in each operation, based upon business requirements. For example, you can disable the Billing page for the two helpdesk display templates if interdepartmental billing is not available, change the Customer Information section label to Employee Information for the helpdesk display templates, disable the Dispute Information section in display templates that are not pertinent to the communications industry, and so on. To allow easy access to components that are shown in different display templates, you can provide a unique set of content references (CREF), one used to add and one to search for records) that appear on the left hand navigation menu for each component and display template combination.

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 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. Exercise caution when planning to modify system data or create additional display templates; it is considered customization and therefore is not supported by PeopleSoft.

Pages Used to Configure Display Templates for Components

Page Name	Object Name	Navigation	Usage
Display Template	RDT_TMPL_PAGE	Set Up CRM, Common Definitions, Component Configuration, Display Template Details	Use this page as an entry point to control the appearance and behavior of the specified component.
Display Template - Page Definition	RDT_TMPL_SECTN	Click a page link in the Pages grid on the Display Template page.	Select page sections that can be configured by display templates, which includes enabling or disabling fields, and modifying labels. Click to Show Section Details link to review fields that are defined for sections and configure them.
Display Template - Page SubTab Definition	RDT_TMPL_STB	Click the Modify SubTabs link on the Display Template - Page Definition page. This link is available only to pages that have subtab sections.	Modify the list of subtabs that are available for displaying page sections, which includes changing the order, labels of the subtabs, selecting a default subtab to display and entering the dropdown text for the subtabs to show in the Go To field of the toolbar.
Display Template - Section Embedded Tab Definition	RDT_TMPL_EMB	Click the Modify Embedded Tabs link on the Display Template - Page Definition page. This link is available only to pages that have embedded tab sections.	Modify the list of embedded tabs that are available for display in the embedded tab section, which includes changing the order, labels of the embedded tabs, selecting a default tab to display.
Display Template - Label Definition	RDT_TMPL_LABEL_SEC, RDT_TMPL_LABEL_EMB	Click a link, which can be a section label, a field label or a tab label.	Specify the label text by choosing from existing message catalog entries or field labels. You can also create new message catalog entry if existing ones do not apply.

Delivered Display Templates for Call Center Applications

System-delivered display templates for call center applications:

Call Center Applications

System-delivered display templates for call center applications:

RC_AGT_CASES_PGT	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_HHD (HR HelpDesk)
	CRM_INS (Insurance)
	RC_HELPDESK (HelpDesk)
	RC_SUPPORT (Support)
RC_CASE	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_HHD (HR HelpDesk)
	CRM_INS (Insurance)
	RC_HELPDESK (HelpDesk)
	RC_SUPPORT (Support)
RC_CASE_HD_SS	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_CASE_HD_SS_RPT	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_CASE_HD_SS_SRCH	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)

RC_CASE_SEARCH	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_HHD (HR HelpDesk)
	CRM_INS (Insurance)
	RC_HELPDESK (HelpDesk)
	RC_SUPPORT (Support)
RC_CASE_SW_SS	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_CASE_SW_SS_RPT	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_CASE_SW_SS_SRCH	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)

RC_SOLNSRCH_HD_SS	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_SOLNSRCH_SW_SS	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)
RC_SS_HD	CRM_HHD (HR HelpDesk)
	RC_HELPDESK (HelpDesk)
RC_SS_SW	CRM_COM (Communications)
	CRM_ENG (Energy)
	CRM_FIN (Financial Services)
	CRM_GOV (Government)
	CRM_INS (Insurance)
	RC_SUPPORT (Support)

Important! PeopleSoft CRM delivers system data for each component that supports display templates. Stored in the Display Template System Data component, the system data dictates which parts of the component that functional users are able to control using the predefined display templates (display templates are defined in the Display Template Definition component). Access to these two components is restricted to IT administrators only. Exercise caution when planning to modify system data or create additional display templates; it is considered customization and therefore is not supported by PeopleSoft.

Enabling Pages and General Options

Access the Display Template page.

Display Template

Template ID RC_SUPPORT **Description** Support

Component RC_CASE

Pages

Enable	Page	Add Mode Default	Update Mode Default	Comments
☑	Case	☑	☐	Case Main page
☑	Solution	☐	☐	Solution
☑	Summary	☐	☑	Summary
☑	Notes	☐	☐	Case Note
☑	Case History	☐	☐	History
☑	Related Cases	☐	☐	Related Cases
☑	Related Actions	☐	☐	Related Objects
☐	Interested Parties	☐	☐	Interested Parties
☐	Billing	☐	☐	Billing
☐	Attributes	☐	☐	Attributes

Display Template page (1 of 2)

General Options

Option	Value	Comments
Configurable Search ID	RC_SUPPORT	Choose the configurable search definition to use for this template.
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	SEND SELECTED NOTES	Choose the E-mail Form ID that you want to use to E-mail Case Notes.
Email Template for Solutions	Email Resolution to Customer	Choose the E-mail Form ID 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.

Display Template page (2 of 2)

You can review a list of system-delivered display templates in the Display Template Details component. Select a display template from the list and use it to configure the corresponding component.

Pages

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

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

Add Mode Default Select to show the corresponding page by default when you create a transaction for the component. It’s optional and you can select only one page to be 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 who access the component have no permission to the default page, the system displays the first page in the component that they have permission to access.

Update Mode Default Select to show the corresponding page by default when you open an existing transaction for the component. It’s optional and you can select only one page to be the default. The display logic that is used for the add mode applies to the update mode as well.

General Options

This grid 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. For example, select the configurable search ID from the Value drop down list box if you plan to use configurable search for a given display template and component combination; or select the appropriate application class extension if the system should perform some application specific logic when certain user event takes place. 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.

Configurable Search ID Choose the configurable search definition template.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages,” Configuring Searches.

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

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

360 Degree Version Choose *360* to use for this template. Options are *Customer*, *HRHD Worker*, and *Worker*.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up the 360-Degree View”.

Application Set Extension 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 Select the Solution Advisor Search Definition Name to use for this template.

	See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook*, “Setting Up Solution Management,” Defining Record-Based Search Index Templates.
BO Search Adapter name	Choose the Adapter to use for this template on this component. See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Setting Up Business Object Search and Quick Create”.
Email Template for Case Notes	Choose the Email Form ID that you want to use to email Case Notes. See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Defining Settings for Template-Based Correspondence”.
Email Template for Solutions	Choose the Email Form ID that you want to use to email Solutions. See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Defining Settings for Template-Based Correspondence”.
Portal Name	Select the Portal to use for Transferring using a Content Reference. See Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” Understanding Link Setup, page 53.
Portal Object Name	Select the Content Reference to use for transfers. See Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” Understanding Link Setup, page 53.
Action Group ID	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. See Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” page 53.

CHAPTER 3

Setting Up Call Center Prompt Tables

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

This chapter provides overviews of the call center prompt tables and discusses how to:

- Set up basic prompt tables for all call center application cases.
- Set up problem codes for PeopleSoft Support material returns.
- Set up reason codes.
- Set up case relationship types and labels.

See Also

Chapter 5, "Setting Up Links to PeopleSoft HRMS Pages and Related Actions," Understanding Link Setup, page 53

Understanding Call Center Prompt Tables

This section discusses:

- Basic call center prompt tables.
- Delivered values in basic call center prompt tables.

Call Center Prompt Tables

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

Prompt Tables for All Cases

To get your PeopleSoft Customer Relationship Management (PeopleSoft CRM) call center application up and running, define values for these case fields:

- Case Status (required)
- Case Type
- Impact
- Priority
- Severity
- Source

- Category, Specialty Type, and Details
- Quick Code

Note. Each code is associated with values for at least three and up to seven case fields. Values referenced by a currently active quick code cannot be deleted. When an agent enters a quick code into a case, the system automatically enters all of the related data. It does not save the quick code to the case.

- Problem Type

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

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Setting Up Products”.

Problem Codes for PeopleSoft Support Material Returns

This topic is specific to PeopleSoft Support.

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

See Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Problem Codes for PeopleSoft Support Material Returns, page 43.

Reason Codes

Enter a reason codes that defines reasons for various actions. There are three different reason types that are associated with a reason code:

- 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.

See Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Reason Codes, page 44.

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—this resolves everyone’s problem. Create a global case for the problematic Web server and child cases (sometimes called tickets) where each person is reporting the problem. Maintain a parent-child relationship between the global case and all of the tickets. Based on this relationship, you can close all of the child tickets once the global case is closed.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 45.

- 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 impact 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.

There are also duplicate cases, cause-and-effect cases, and any other kind of case relationships that you can imagine.

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, there are separate labels for the parent case and the child case. If the relationship is equivalent, there is only one valid label.

Note. 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. This field is only enterable if the Hierarchical check box is clear. Was able to enter data into the Equivalent Label field and save even when the Hierarchical check box was not clear.

See Also

Chapter 8, "Managing Cases," page 99

Chapter 9, "Processing Cases," page 139

Chapter 12, "Managing Material Returns," page 181

Chapter 13, "Using Change Management," page 195

Chapter 15, "Working with Self-Service Application Transactions," page 229

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Integrating with PeopleSoft Applications"

PeopleSoft Enterprise 8.8 Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook

Delivered Values in Call Center Prompt Tables

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

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

Relationship Types

This table lists the delivered relationship types:

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

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Understanding Active Analytics Framework

Common Elements Used in this Chapter

SetID

Enter a setID. Except for quick codes, which are associated with business units, all of the prompt tables described in this chapter are associated with setIDs. This 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 self-service application users can select when creating new cases.

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

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

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

Short Name

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

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

Self-Service Description

Enter a description regardless of whether the Self-Service check box is selected. This entry describes the value to self-service application users. Even if users can’t 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.

	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 fifty 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 Prompt Tables for Cases

This section discusses how to set up the following prompt tables:

1. Case status.
2. Case type.
3. Priority.
4. Severity.
5. Impact.
6. Source.
7. Problem Type.
8. Category.
9. Types and Detail within each Category.
10. Quick Code.

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 must reference a category, a specialty type, and a detail. Quick codes can optionally reference a case priority, a solution, a provider group, and an agent.
- You must set up product before you set up problem types.
- If you want to use competencies in case assignment, establish competencies before you set up the Category, Type, Detail, and Problem Types pages.
- You must set up product before you set up problem types.

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, “Managing Solutions”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers”

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up and Maintaining Provider Groups and Group Members”

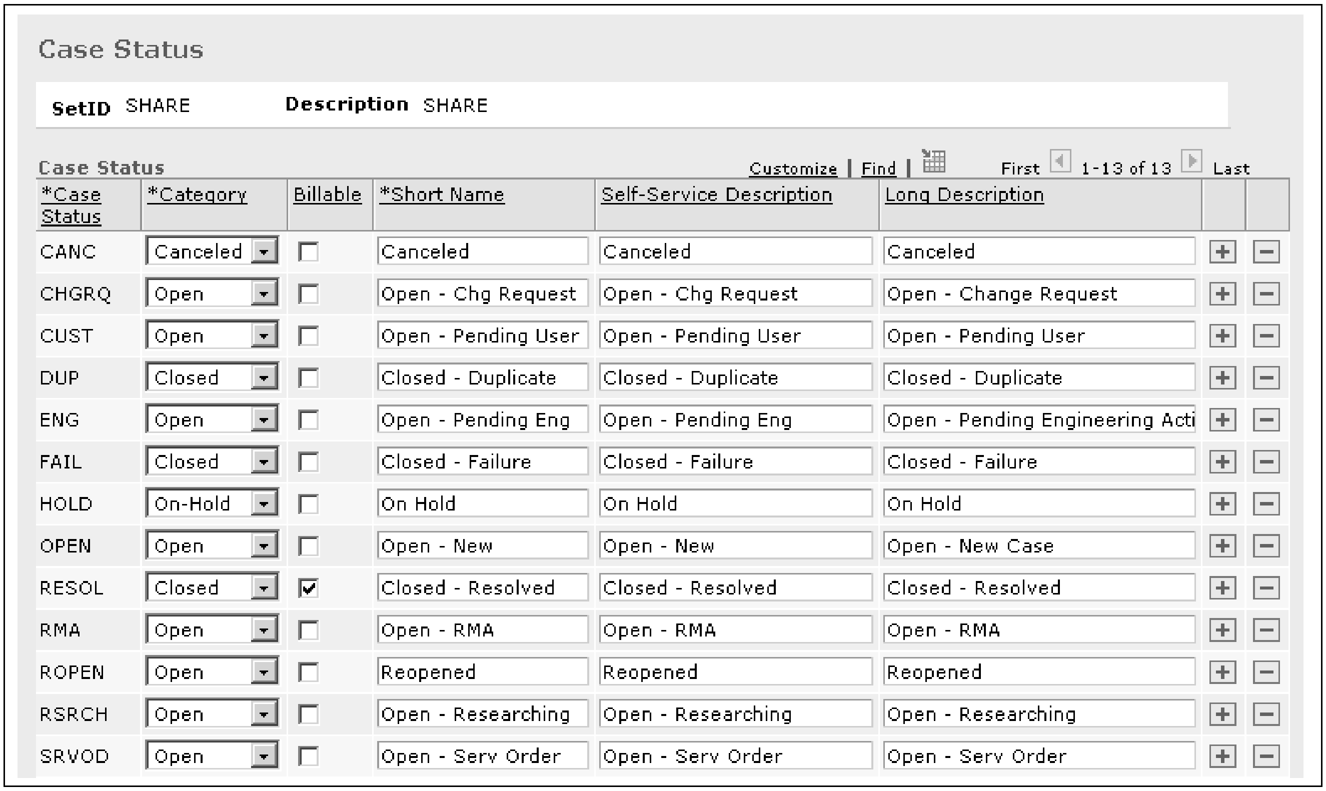
PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Managing Workforce Competencies,” Setting Up Competency Information in PeopleSoft CRM

Pages Used to Set Up Prompt Tables for All Cases

Page Name	Object Name	Navigation	Usage
Case Status	RC_STATUS	Set Up CRM, Product Related, Call Center, Status, Case Status	Set up case statuses.
Case Type	RC_CASE_TYPE	Set Up CRM, Product Related, Call Center, Case Type, Case Type	Set up case types.
Priority	RC_PRIORITY	Set Up CRM, Product Related, Call Center, Priority, Priority	Set up case priorities.
Severity	RC_SEVERITY	Set Up CRM, Product Related, Call Center, Severity, Severity	Set up case severity values.
Source	RC_SOURCE	Set Up CRM, Product Related, Call Center, Source, Source	Set up valid methods people can use to report cases. You can track cases that are created through self-service or cases that are initially created by your computer and telephony integration system.
Problem Type	RC_PROBTYPE	Set Up CRM, Product Related, Call Center, Problem Type, Problem Type	Set up problem types. Associate problem types to products and the competencies that one would need to resolve the particular problem.
Category	RC_CATEGORY	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category	Set up case categories.
Specialty Type and Detail	RC_CA_TY_DE_PNL	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type and Detail.	Set up case specialty types and details within each category.
Impact	RC_CA_TY_DE_PNL	Set Up CRM, Product Related, Call Center, Impact	Set up case impacts.
Quick Code	RC_QUICK_CODE	Set Up CRM, Product Related, Call Center, Quick Code	Set up quick code shortcuts that an agent can use to enter data automatically into various fields on the Case page.

Setting Up Case Statuses

Access the Case Status page.



Case Status

SetID SHARE Description SHARE

Case Status Customize | Find | First 1-13 of 13 Last

*Case Status	*Category	Billable	*Short Name	Self-Service Description	Long Description
CANC	Canceled	☐	Canceled	Canceled	Canceled
CHGRQ	Open	☐	Open - Chg Request	Open - Chg Request	Open - Change Request
CUST	Open	☐	Open - Pending User	Open - Pending User	Open - Pending User
DUP	Closed	☐	Closed - Duplicate	Closed - Duplicate	Closed - Duplicate
ENG	Open	☐	Open - Pending Eng	Open - Pending Eng	Open - Pending Engineering Acti
FAIL	Closed	☐	Closed - Failure	Closed - Failure	Closed - Failure
HOLD	On-Hold	☐	On Hold	On Hold	On Hold
OPEN	Open	☐	Open - New	Open - New	Open - New Case
RESOL	Closed	☑	Closed - Resolved	Closed - Resolved	Closed - Resolved
RMA	Open	☐	Open - RMA	Open - RMA	Open - RMA
ROPEN	Open	☐	Reopened	Reopened	Reopened
RSRCH	Open	☐	Open - Researching	Open - Researching	Open - Researching
SRVOD	Open	☐	Open - Serv Order	Open - Serv Order	Open - Serv Order

Case Status page

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

Open: Case needs to be resolved.

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

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

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

Billable Select if you bill for support and integrate with a billings system.

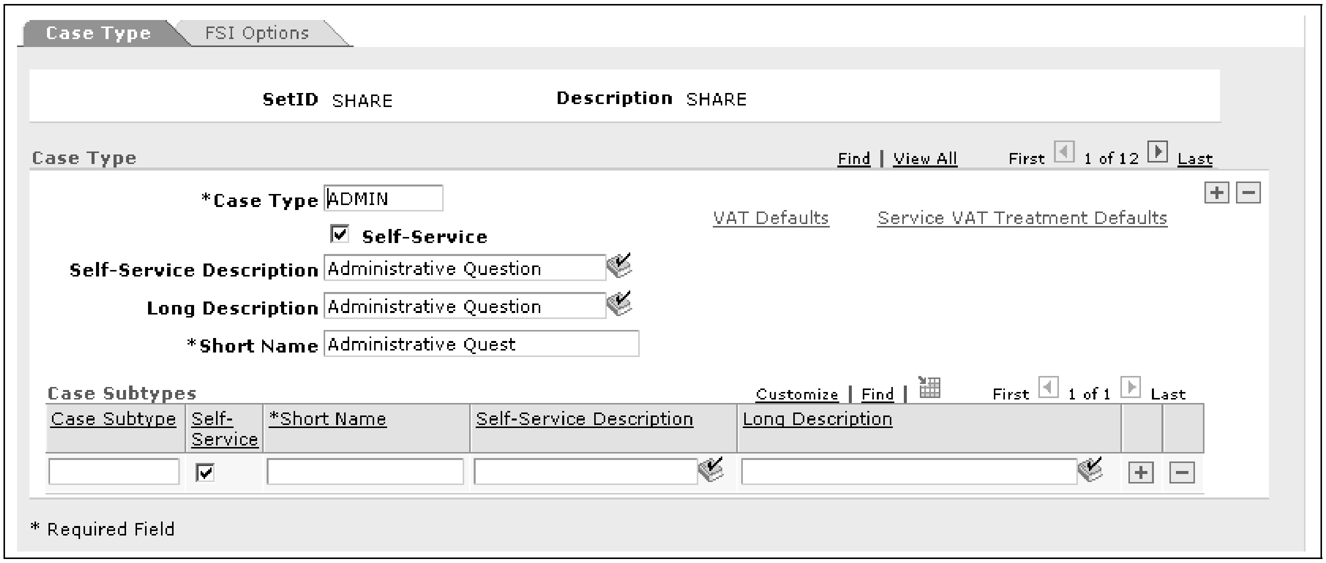
See Also

Chapter 3, "Setting Up Call Center Prompt Tables," Delivered Values in Call Center Prompt Tables, page 31

Chapter 8, "Managing Cases," Case Closure, page 109

Setting Up Case Types

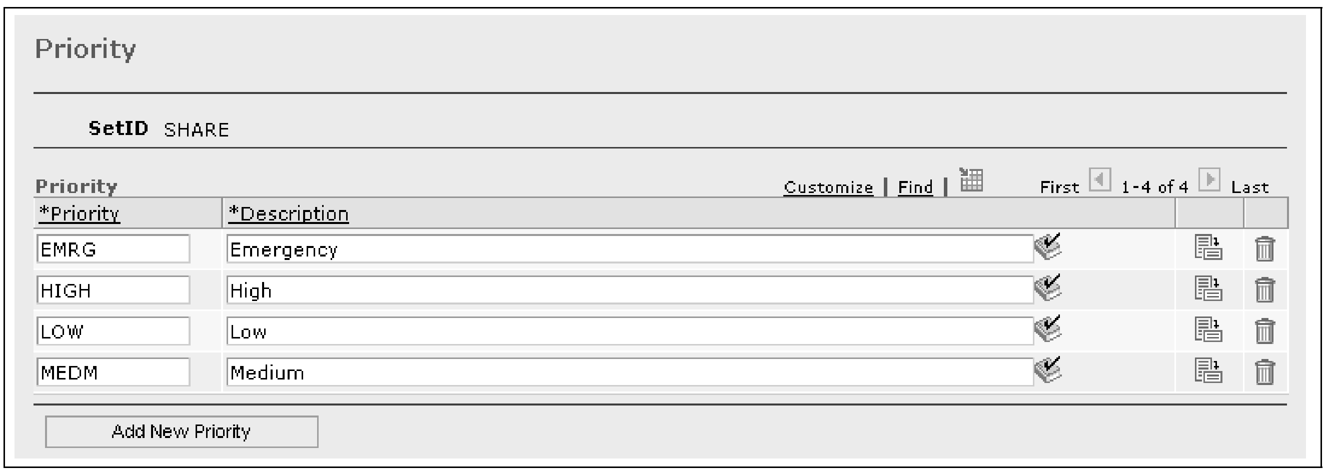
Access the Case Type page.



Case Type page

Setting Up Case Priorities

Access the Priority page.



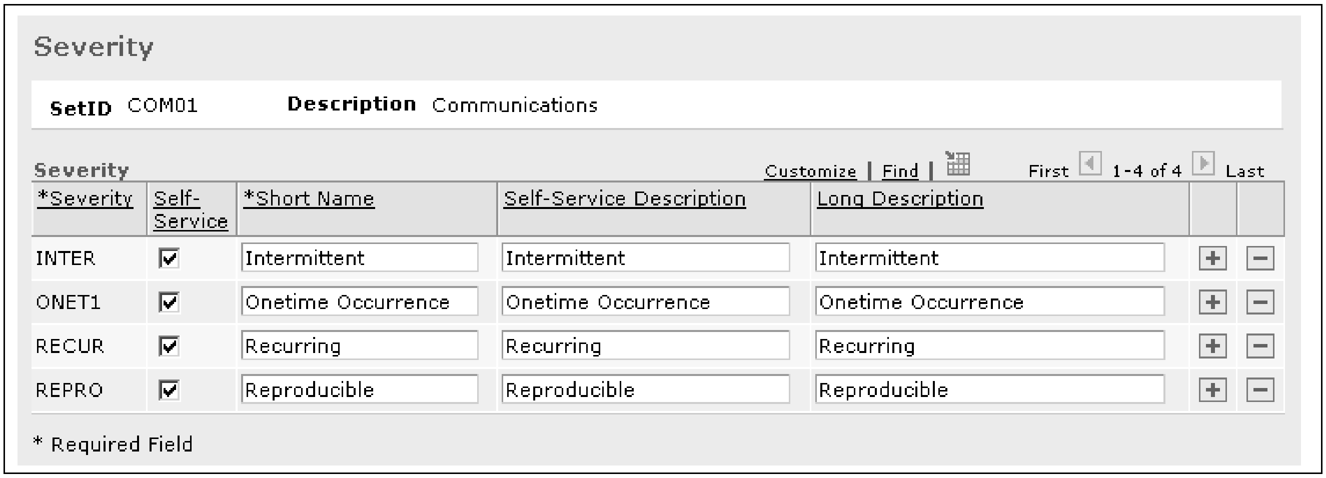
Priority page

Category

Select a category—all priority values are associated with a priority category. Values are *High*, *Medium*, or *Low.* The association between a priority and a priority category enables the High Priority Problem Reports chart on the Manager's Dashboard to identify high priority cases.

Setting Up Case Severity Values

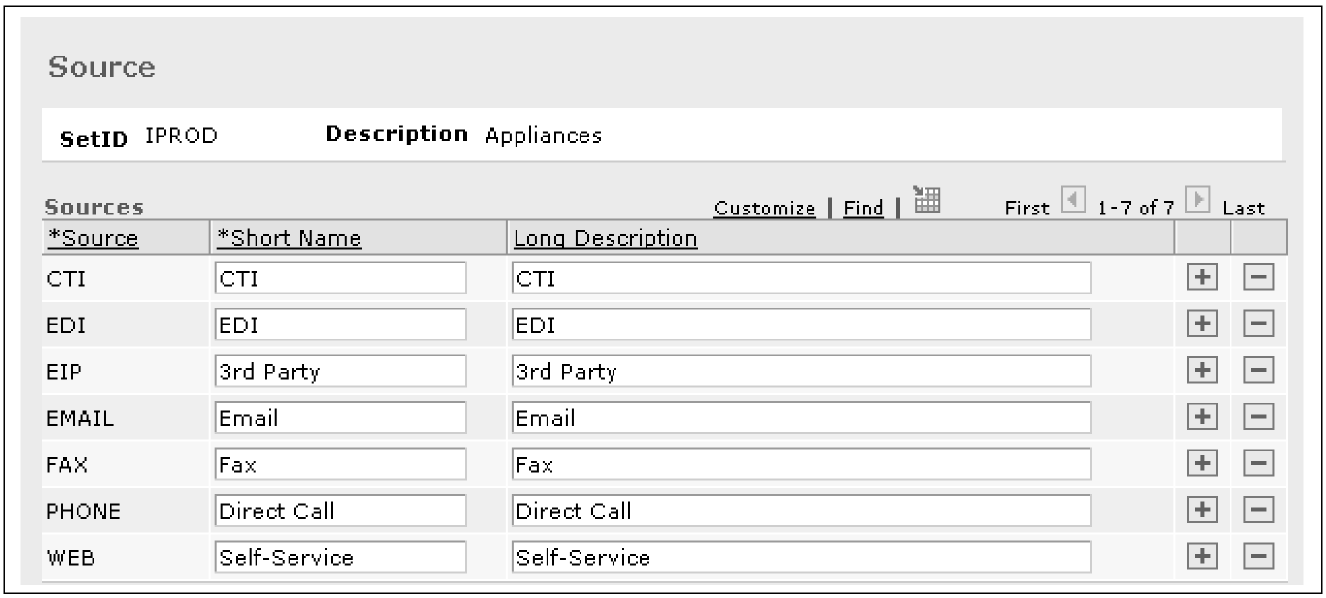
Access the Severity page.



Severity page

Setting Up Case Sources

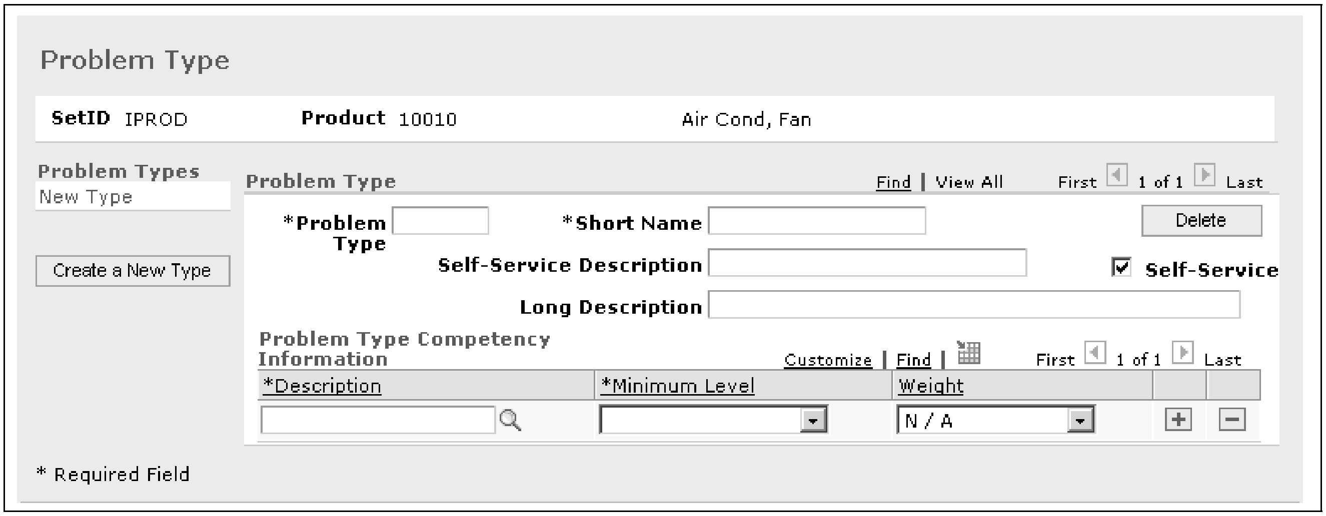
Access the Source page.



Source page

Setting Up Problem Types

Access the Problem Type page.



Problem Type page

Problem Type Enter an abbreviation to represent the problem type. There is a five character maximum.

Problem Type Competency Information

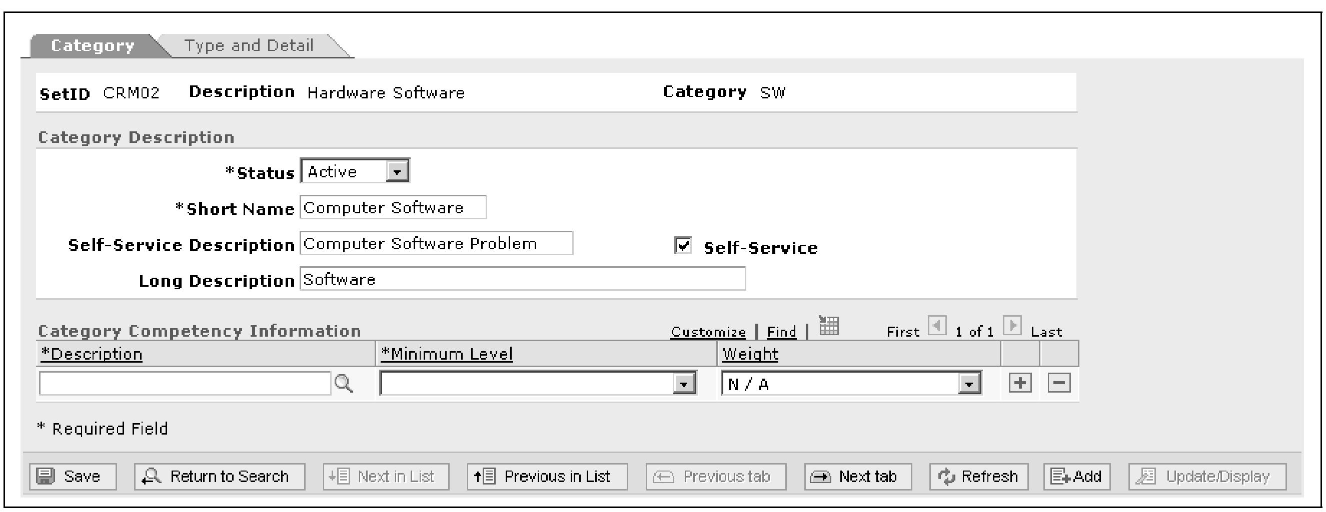
Description Enter the competency needed to resolve the problem.

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

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

Setting Up Case Categories

Access the Category page.



Category page

Category Competency Information

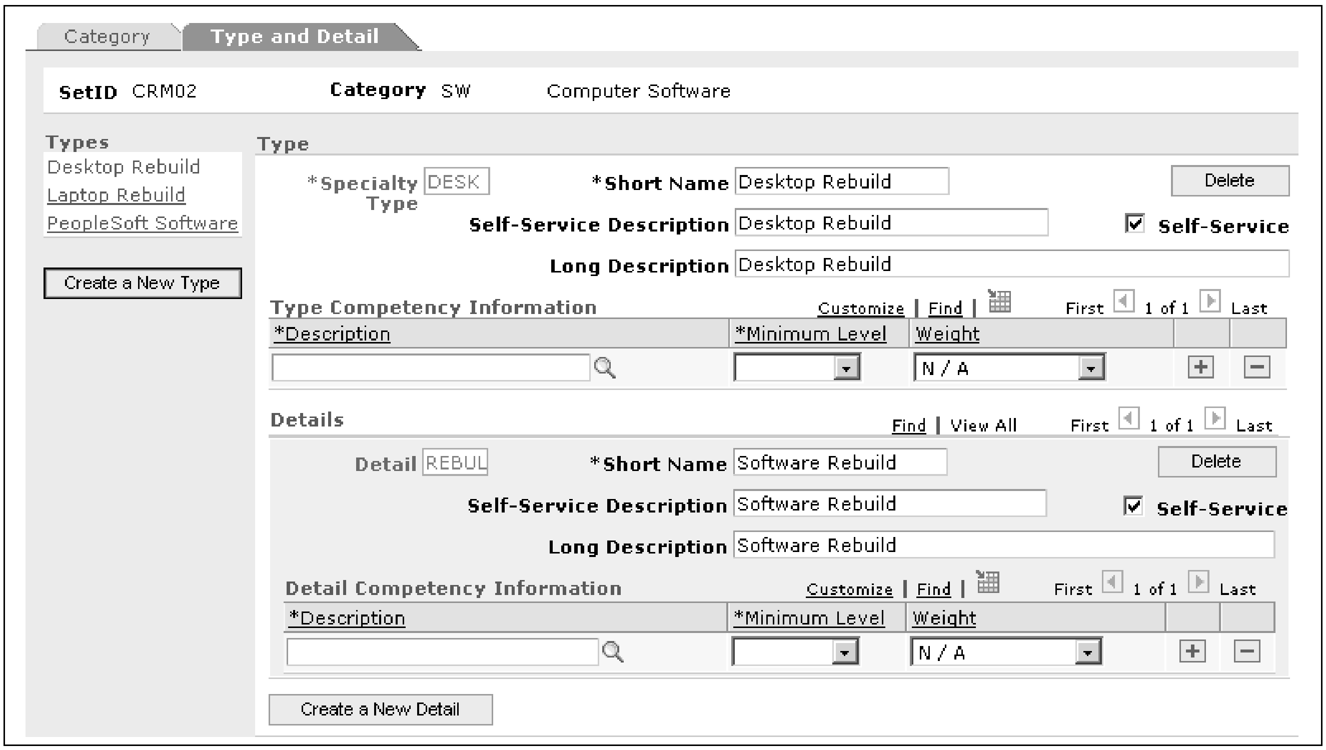
Description Select the competency needed to resolve problems in the category that appears.

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

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

Setting Up Case Specialty Types and Details Within Each Category

Access the Type and Detail page.



Type and Detail page

Types This page displays the specialty types that already exist for the specified category. The specialty type that is not a link is the one that currently appears in the main area of the page. To view or modify a different specialty type, click the corresponding link.

Create a New Type Click to create a new specialty type.

Type and Detail Competency Information

Description Select the competency needed to resolve problems for the type of problem that appears.

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

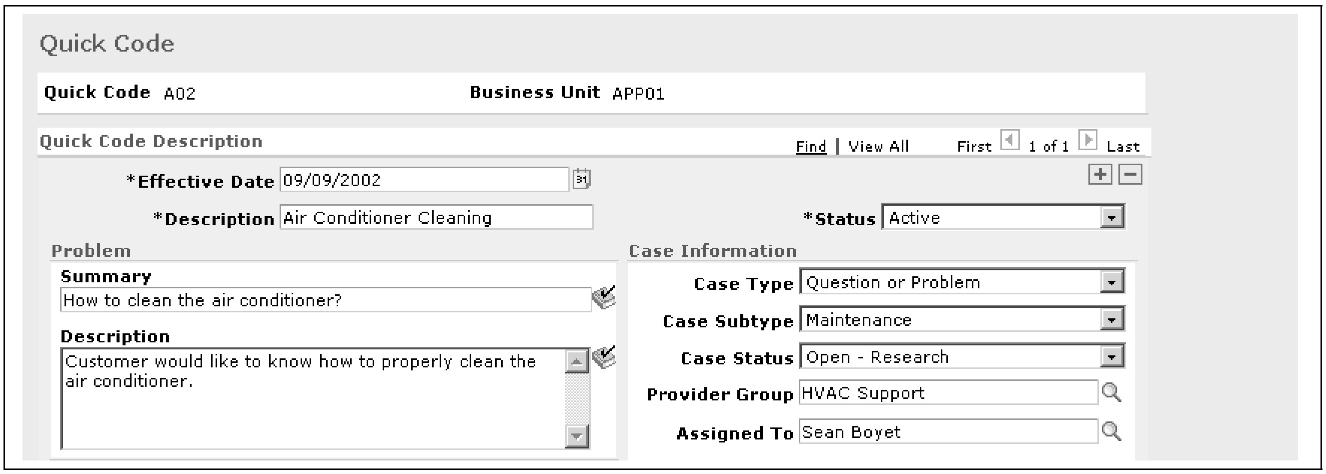
Weight Select the level of importance that you want to assign to the competency. The system uses this weighting factor during the assignment process to locate the best person available to resolve the problem.

Create a New Detail Click to create a new detail. The system displays a set of blank fields in the Details group box, so you can enter new information.

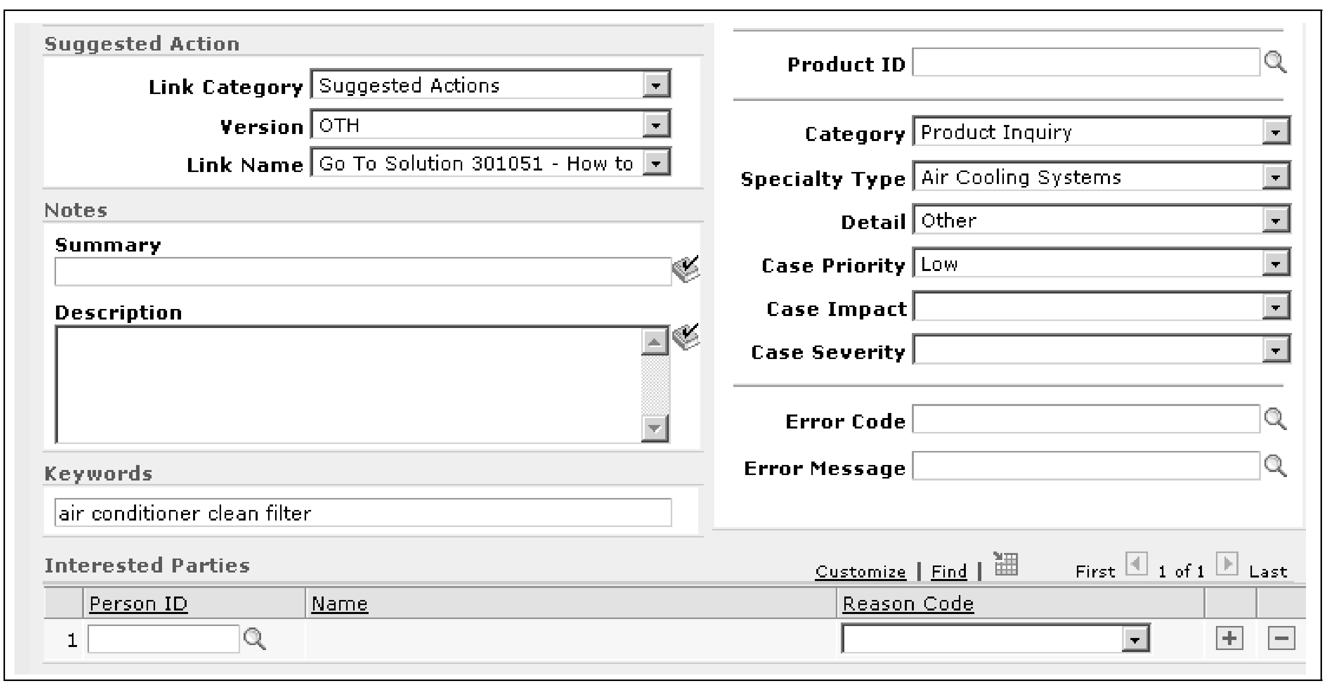
Setting Up Quick Codes

You can used quick code to have the system suggest an action and to populate other fields on the case page.

Access the Quick Code page.



Quick Code (1 of 2)



Quick Code (2 of 2)

Quick Code page

Quick Code	This page displays a unique code that agents can use to populate multiple fields on the Case page automatically.
Business Unit	Enter the business unit of the call center that is to use this quick code.
Description	Enter a short text description of the code. There is a twenty character maximum.

Problem Information

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

Summary	Select the summary associated with this quick code.
Description	Select the description associated with this quick code.

Case Information

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

Case Type	Select the case type associated with this quick code.
Case Sub Type	Select the case sub type associated with this quick code.
Case Status	Select the case status associated with this quick code.
Provide Group	Select the provider group associated with this quick code.
Assign To	Enter the agent to whom the case is to be assigned. If you've specified a provider group, you can select agents who are part of that group only.
Product ID	Select the product ID associated with this quick code.
Category	Select the category associated with this quick code.
Specialty Type	Select the specialty type associated with this quick code.
Detail	Select the detail associated with this quick code.
Case Priority	Select the priority to be assigned to a case.
Case Impact	Select the impact to be assigned to a change request.
Case Severity	Select the severity to be assigned to a case.
Error Code	Select the error code to be assigned to a case.
Error Message	Select the error message to be assigned to a case.

Suggested Actions

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

Link Category	Enter the link category to be associated with a case.
Version	Enter the link category's version to be assigned to a case.
Link Name	Enter the link name to be associated with a case.

Notes

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

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

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

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook,* “Working with Notes and Attachments”.

Keywords

Enter the keywords to be associated with a case. These keywords will appear in the Keywordsfield on the Solutions page of the Case component, thus driving the search for solutions for the case.

See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook,* “Using Solutions,” Searching for Solutions.

Interested Parties

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

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

Setting Up Problem Codes for PeopleSoft Support Material Returns

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

Note. This is not applicable to PeopleSoft HelpDesk applications.

See Also

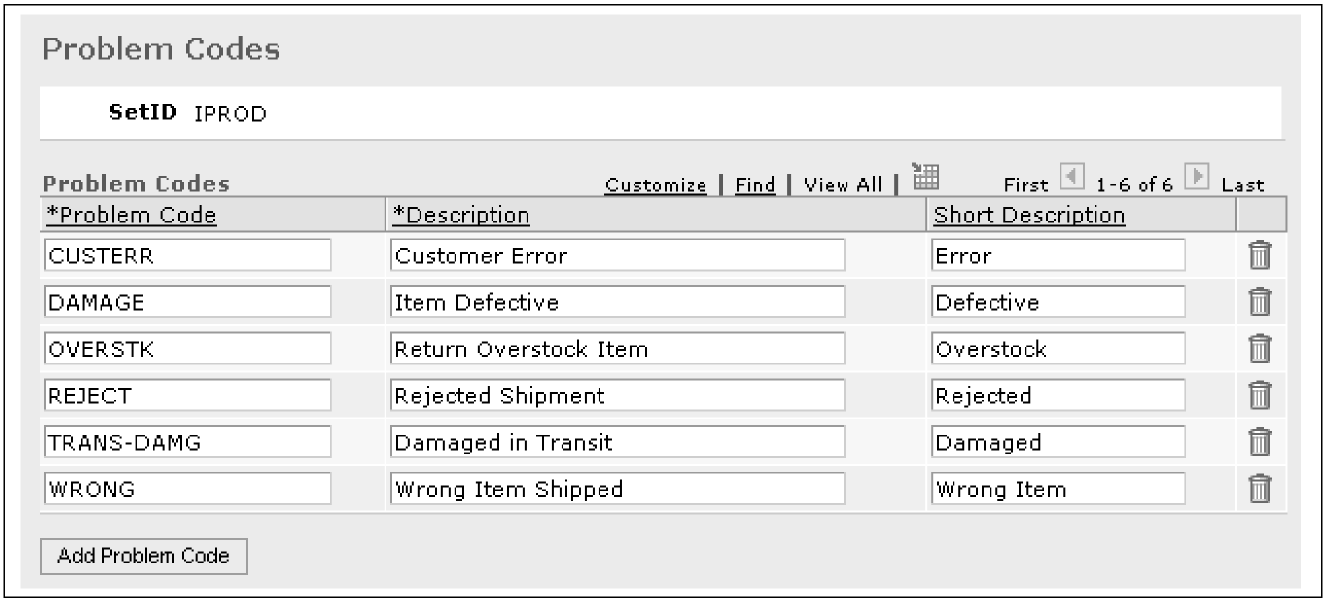
Chapter 12, “Managing Material Returns,” Understanding Material Return Processing, page 181

Page Used to Set Up Problem Codes

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

Setting Up Problem Codes

Access the Problem Codes page.



Problem Codes page

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

See *PeopleSoft Enterprise 8.8 Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management PeopleBook.*

Setting Up Reason Codes

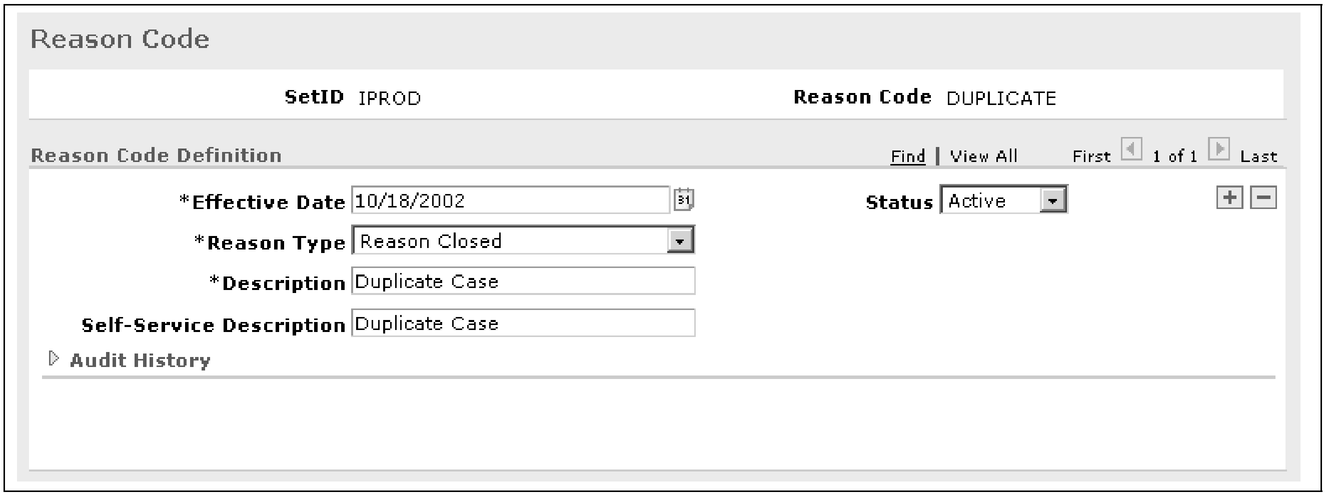
This section discusses how to set up reason codes.

Page Used to Set Up Reason Codes

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

Creating Reason Codes

Access the Reason Code page.



Reason Code page

Reason Type Select a reason type.

Setting Up Case Relationship Types and Labels

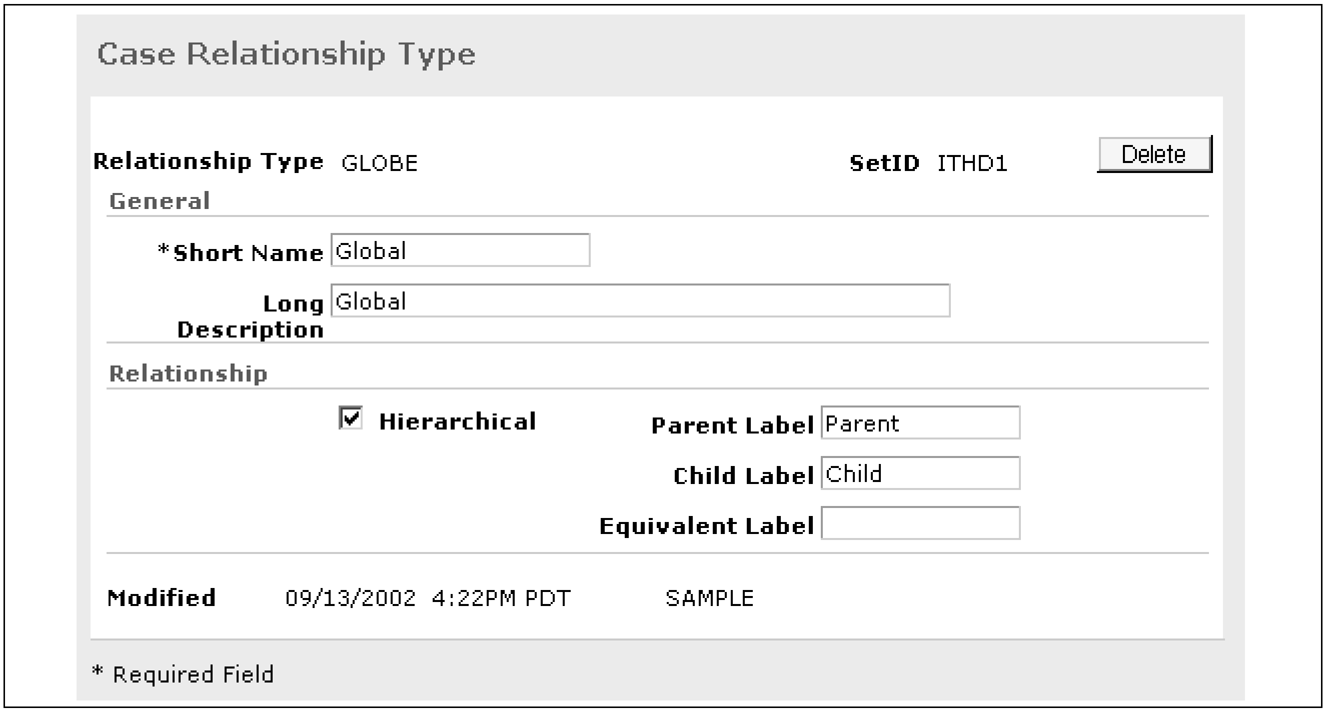
This section discusses how to set up case relationship types and labels.

Page Used to Set Up Case Relationship Types and Labels

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

Setting Up Case Relationship Types and Labels

Access the Case Relationship Type page.



Case Relationship Type page

Relationship

Hierarchical

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

Parent Label and**Child Label**

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

You can enter information into these fields only if theHierarchical check box is selected.

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 the Hierarchical check box is clear.

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.*

CHAPTER 4

Setting Up RMA Processing

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

- Activate the required application message enterprise integration points (EIPs).
- Set up business interlinks.
- Define call center business units.
- Define items.
- Define defaults and procurement options for requisition processing.
- Define valid requisition requester IDs.
- Set up links to PeopleSoft Purchasing and PeopleSoft Inventory.
- Synchronize problem codes and reason codes.
- View RMA status.
- Process return-and-replace RMAs in PeopleSoft Supply Chain Management.

Note. This chapter is relevant to PeopleSoft Support only; PeopleSoft HelpDesk applications do not incorporate RMA functionality.

See Also

Chapter 12, "Managing Material Returns," Understanding Material Return Processing, page 181

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, "Checking Item Balances and Availability"

Understanding RMAs in PeopleSoft Support

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

Business units defined in PeopleSoft Supply Chain Management are available for selection on the Call Center BU page in PeopleSoft Support only if the Business Unit EIP has been implemented.

Note. Business units defined in PeopleSoft Supply Chain Management are available for selection on the Call Center BU page in PeopleSoft Support only if the Business Unit EIP has been implemented.

Activating the Required Application Message EIPs

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

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

As delivered, PeopleSoft EIP application messages are inactive. In the PeopleSoft Customer Relationship Management (PeopleSoft CRM) and PeopleSoft Supply Chain Management systems, you must activate the required application messages, set the associated message channel to Run mode, define the publication or subscription routing rules, and configure an existing message node or define a new one.

See Also

PeopleSoft Integration Broker

PeopleSoft Integration Tools and Utilities

Setting Up Business Interlinks

The Item Balance EIP is a business interlink EIP. When you implement this EIP, you must modify the business interlink definition, RF_IN_ITEM_BALANCES, to reference the correct merchant URL, user ID, and password for PeopleSoft Inventory.

See Also

PeopleSoft Business Interlink Application Developer Guide

PeopleSoft Integration Tools and Utilities

Defining Items

Item information in PeopleSoft CRM must be synchronized with item information in PeopleSoft Supply Chain Management. Although PeopleSoft CRM pages enable you to enter item information manually in PeopleSoft CRM, use the Item Master EIP to populate item tables in PeopleSoft CRM with the master item data in PeopleSoft Supply Chain Management. Once the Item Master EIP has been activated, however, the pages of the Item Definition component in PeopleSoft CRM can be used to view item information only. You will be unable to add or update item definitions in PeopleSoft CRM.

As delivered, PeopleSoft EIP application messages are inactive. In both your PeopleSoft CRM and PeopleSoft Supply Chain Management systems, you must activate the required application messages of the Item Master EIP, set the associated message channel to run mode, define the publication or subscription 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 Supply Chain Management—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 Supply Chain Management.

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 it is defined.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Defining Items”

Defining Defaults and Procurement Options for Requisition Processing

Call center business units in PeopleSoft CRM that can create RMAs must be defined as valid sources of requisitions in PeopleSoft Supply Chain Management. Using the Requisition Loader Defaults component in PeopleSoft Supply Chain Management, 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 Enerprise 8.9 Purchasing PeopleBook.*

When defining 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. Sourcing processes in PeopleSoft Purchasing can be configured 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. Inventory business units representing field service trucks should not be included in distribution networks.

See *PeopleSoft Enterprise 8.9 Inventory PeopleBook.*

Note. Business units defined in PeopleSoft Support are available for selection on pages in PeopleSoft Supply Chain Management only if the Business Unit EIP has been implemented.

See *PeopleSoft Enterprise 8.8 Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management PeopleBook.*

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, 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, the requester ID on requisitions staged in PeopleSoft Purchasing must be defined as a valid requester ID in PeopleSoft Supply Chain Management. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management.

See *PeopleSoft Enterprise 8.8 Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management PeopleBook.*

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 in PeopleSoft Purchasing.

See *PeopleSoft 8.9 Purchasing PeopleBook.*

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.

Setting Up Links to PeopleSoft Purchasing and PeopleSoft Inventory

When using the RMA Form component within the portal, you can link to theRequisition Workbench component in PeopleSoft Purchasing and the Item/Product Availability inquiry component in PeopleSoft Inventory. Implementation of these links depends on where the portal is installed in your system. If the portal is installed on the PeopleSoft CRM database, no further setup is required. However, if the portal is not installed on the PeopleSoft CRM database, you must change the URL for the RF_FDM_LINKS entry in the URL Catalog to point to the database on the portal for PeopleSoft Supply Chain Management. Change the URL for the RF_FDM_LINKS entry on the URL Maintenance page under the Utilities menu in PeopleTools.

See Also

PeopleSoft Integration Tools and Utilities

PeopleTools Internet Technology

Synchronizing Problem Codes and Reason Codes

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

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," page 29

PeopleSoft Enterprise 8.8 Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management PeopleBook

Viewing RMA Status

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, you can 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, the replacement requisitions or material stock requests should be created using the same ID as the RMA.

See *PeopleSoft Inventory PeopleBook.*

CHAPTER 5

Setting Up Links to PeopleSoft HRMS Pages and Related Actions

PeopleSoft uses links to provide PeopleSoft HelpDesk for Human Resources users the ability to link to PeopleSoft HRMS page, and for all other call center application users the ability to relate actions to cases.

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

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

Understanding Link Setup

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

This section discusses:

- Link definitions.
- Link presentation on the case page.
- Link groups delivered by PeopleSoft.
- Link categories delivered by PeopleSoft.
- Link definitions delivered by PeopleSoft (content references).

Link Definitions

For users of PeopleSoft HelpDesk for Human Resources, this linking method enables you to run PeopleSoft HRMS on multiple databases, using multiple PeopleSoft HRMS versions.

Link Setup

To link to an action (this includes linking from PeopleSoft HelpDesk for Human Resources to a page in PeopleSoft HRMS) 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.

There can be multiple versions of a category, each associated with a different target system (for example PeopleSoft HRMS 8.8, PeopleSoft HRMS 8.3, and so on). However, only one version of a category can be active at any time.

3. Link definitions.

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

For security considerations when linking from a case from PeopleSoft HelpDesk for Human Resources to PeopleSoft HRMS only, you must:

- 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 HRMS node per your environment.

- Set up user Ids for both PeopleSoft HRMS and PeopleSoft CRM.
- Set up single sign on.

  See *PeopleTools Internet Technology*

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

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

Link Presentation on the Case page

After links are set up, the link category (ies) will appear in the Action 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.

The group box can accommodate multiple link categories for PeopleSoft HelpDesk for Human Resources.

Note. This security is different from the security established for the target page in the PeopleSoft HRMS.

The group box displays:

- The link category (ies) name.
- A drop-down list box per link category for the user to specify a specific link within the category.
- 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 the *target* page, the target's search page appears.

Link Groups Delivered by PeopleSoft

This table lists the link categories delivered by PeopleSoft:

Link Group ID	Description
COM	Communications
ENG	Energy
FIN	Financials
GOV	Government
HDREL	Helpdesk Related Actions
HITEC	Hi-Technology
HRMS	HR HelpDesk
INS	Insurance
SPRT	Support Related Actions

Link Categories Delivered by PeopleSoft

This table lists the link categories delivered by PeopleSoft:

Link Category	Link Version	Action Flag	Long Description	Description
BENEF	8.O SP1	Inactive	Benefits	Benefits
BENEF	8.3	Inactive	Benefits	Benefits Resources
BENEF	8.8	Active	Benefits	Benefits
HRMS	8.O SP1	Inactive	HRMS	Human Resources
HRMS	8.3	Inactive	HRMS	Human Resources
HRMS	8.8	Active	HRMS	Human Resources
PAYR	8.O SP1	Inactive	Payroll	Payroll

Link Category	Link Version	Action Flag	Long Description	Description
PAYR	8.3	Inactive	Payroll	Payroll
PAYR	8.8	Active	Payroll	Payroll
RELA	Other	Active	Related Actions	Related Actions
STOCK	8.O SP1	Inactive	Stock	Stock
STOCK	8.3	Inactive	Stock	Stock
STOCK	8.8	Active	Stock	Stock
TRNG	8.O SP1	Inactive	Training	Training
TRNG	8.3	Inactive	Training	Training
TRNG	8.8	Active	Training	Training

Link Definitions Delivered by PeopleSoft (Content References)

This section lists the link definitions that are delivered by PeopleSoft:

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 HRMS 8.8

This table lists the link definitions delivered by PeopleSoft for PeopleSoft HRMS, version 8.8.

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	BENEFITS_ ELECTION1	EMPLID
BENEF	BENS	Benefits Summary	HC_ BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	DEBEN	Dependent Benefits	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_ DISABILITY_ BENEFIT_ GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_ DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_ BENEFITS_ CAN_GBL	FSA_ BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_ GBL	FSA_ BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_ BENEFITS_ GBL4	HEALTH_ BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ ADD_BENEF_ GBL	LIFE_ADD_ BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_ PLANS_GBL	LEAVE_ PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_ PLANSA_GBL	LEAVE_ PLANS	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
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	JOBD	Job Data Information	HC_JOB_ DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_ SUMMARY_ GBL7	JOB_ SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_ PERSONAL_ DATA_GBL7	PERSONAL_ DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_ DEPOSIT_ CAN_CAN	DIRECT_ DEPOSIT_ CAN	EMPLID
PAYR	Direct Deposit - USF	Direct Deposit - USF	HC_DIRECT_ DEPOSIT_ USA3	DIRECT_ DEPOSIT	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	Direct Deposit -US	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GENDC	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	Paysheets - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheets - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheets - 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 HRMS 8.3

This table lists the link definitions delivered by PeopleSoft for PeopleSoft HRMS, 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	BENEFITS_ELECTION1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	BENS	Benefits Summary	HC_ BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	DEBEN	Dependent Benefits	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_ DISABILITY_ BENEFIT_ GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_ DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_ BENEFITS_ CAN_GBL	FSA_ BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_ GBL	FSA_ BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_ BENEFITS_ GBL4	HEALTH_ BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ ADD_BENEF_ GBL	LIFE_ADD_ BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_ PLANS_GBL	LEAVE_ PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_ PLANSA_GBL	LEAVE_ PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_ PENSION_ PLANS_GBL	PENSION_ PLAN1	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	PPCAN	Pension Plan (CAN)	HC_ PENSION_ PLAN_GBL5	PENSION_ PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_ PLANS_GBL	RTRMNT_ PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_ SAVINGS_ PLANS_GBL	SAVINGS_ PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_ VACATION_ BENEFIT_ GBL	VACATION_ BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_ EMERGENCY_ CONTACT_ GBL4	EMERGENCY_ CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_ DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_ SUMMARY_ GBL7	JOB_ SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_ PERSONAL_ DATA_GBL7	PERSONAL_ DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_ DEPOSIT_ CAN_CAN	DIRECT_ DEPOSIT_ CAN	EMPLID
PAYR	Direct Deposit - USF	Direct Deposit - USF	HC_DIRECT_ DEPOSIT_ USA3	DIRECT_ DEPOSIT	EMPLID
PAYR	Direct Deposit -US	Direct Deposit - US	HC_DIRECT_ DEPOSIT_ USA5	DIRECT_ DEPOSIT	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	GENDC	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	Paysheets - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheets - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSU	Paysheets - 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 Excercise	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 HRMS 8.0 SP1

This table lists the link definitions delivered by PeopleSoft for PeopleSoft HRMS, 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	BENEFITS_ ELECTION1	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	DEBEN	Dependent Benefits	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_ DISABILITY_ BENEFIT_GBL	DISABILITY_ BENEFIT	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS_CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANSA_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
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	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOBD	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	Direct Deposit - USF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	Direct Deposit -US	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GENDC	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	Paysheets - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheets - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID

Category	Link Name	Short Name	Content Reference	Page Name	Search Key
PAYR	PAYSU	Paysheets - 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 Excercise	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 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 Discovery	EMPLOYEE	CR_RC_ ASSET_ DISCOVERY			EMPLID	
RELA	BPRJ	Create Workflow			RC_ LINKAPPS_ RC	PCode		ExecuteGen-BusinessProject
RELA	BSCR	Branch Script			RC_ LINK: APPS_RC	PCode		ExecuteGen-Script
RELA	CREQ	Change Request			RC_ LINK: APPS_RC	PCode		CreateChange Request
RELA	FRAUD	Case Fraud Workflow			RC_ LINKAPPS_ RC	PCode	BP_ID	ExecuteGen-BusinessProject
RELA	LEAD	Sales Lead			RC_ LINK: APPS_RC	PCode		CreateLead
RELA	NDEF	Defect -Create New			RC_ LINK: APPS_RC	PCode		CreateDefect
RELA	ORDER	Sales Order			RC_ LINK: APPS_RC	PCode		CreateSales-Order
RELA	RDEF	Defect — Relate			RC_ LINK: APPS_RC	PCode		RelateDefect
RELA	REMOT	Remote Control		CR_RC_ REMOTE_ CONTROL			EMPLID	

Category	Link Name	Short Name	Portal CREF	Content Reference	Class Path	Class ID	Search Key	Method
RELA	RMA	Create RMA			RC_ LINK: APPS_RC	PCode		CreateRMA
RELA	SO	Service Order			RC_ LINK: APPS_RC	PCode		CreateSO

Setting Up Content References

This section discusses how to:

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

Pages Used to Set Up Content References

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

Setting Up Content References

PeopleSoft delivers the content references for PeopleSoft HRMS. To link to non-PeopleSoft locations, you must register the links as content references for the employee portal.

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

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

See *PeopleTools Internet 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 there is a mismatch, users receive an error message when they try to access the page.

See *PeopleTools Internet Technology*

Viewing and Modifying Link Definitions

This section discusses how to:

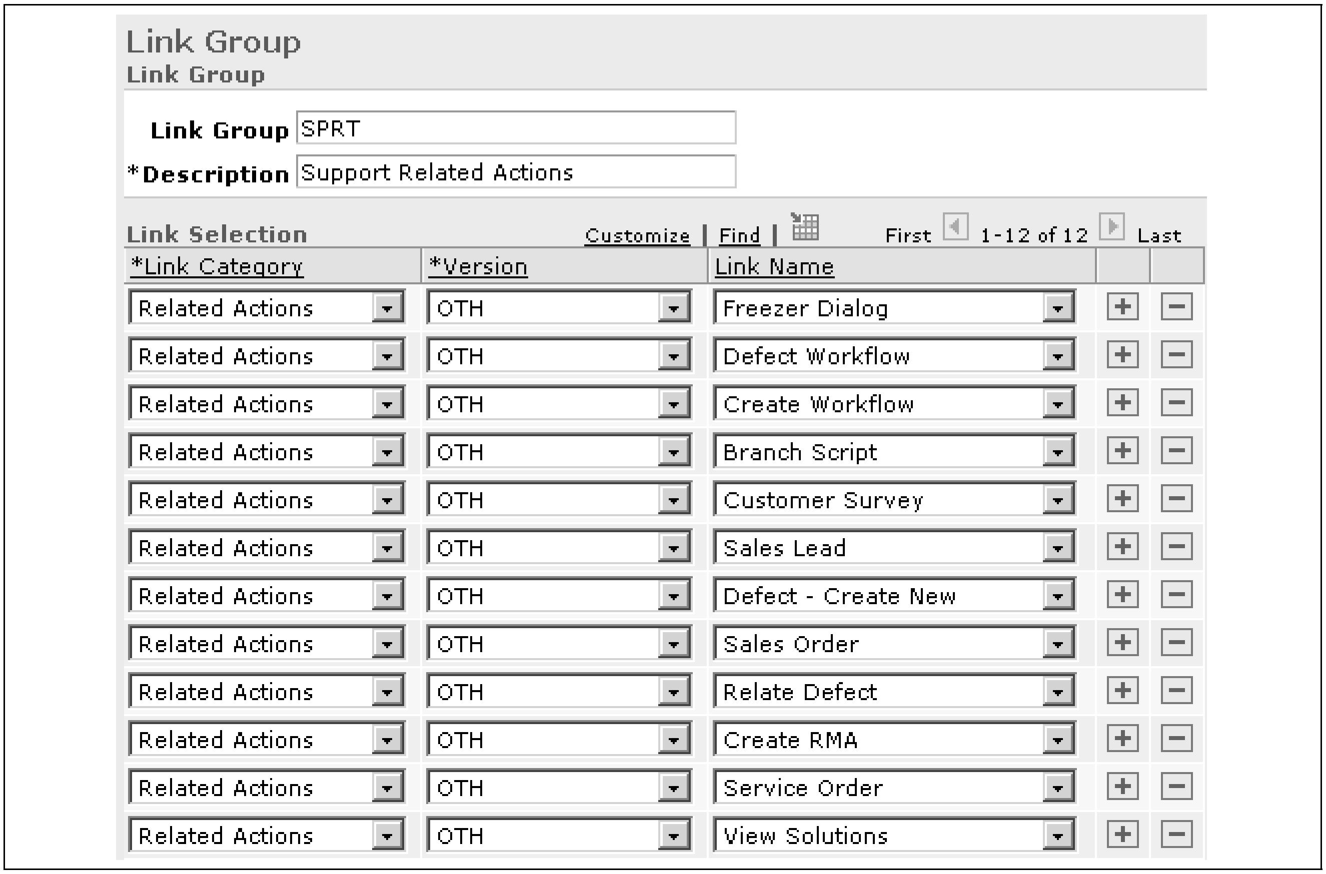
- View and modify link groups.
- View and modify link categories.
- View and modify link definitions.

Pages Used to View and Modify Link Definitions

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

Viewing and Modifying Link Groups

Access the Link Group page.



Link Group page

Link Category Select a link category that contains the desired link definition, to be a part of this link group.

Version Select a version. There can be multiple versions of a category, each associated with a different target system (for example PeopleSoft HRMS 8.8, PeopleSoft HRMS 8.3, and so on). However, only one version of a category can be active at any time. Only the active versions will appear in this drop down list box.

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

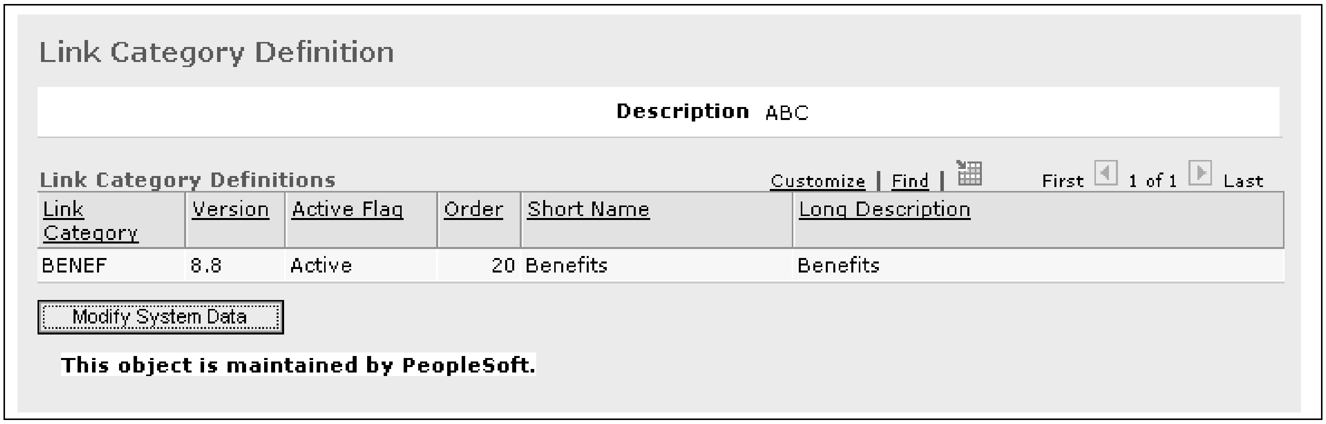
Note. To add a new link group, click the Add button at the end of the row.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Display Template General Options, page 20

Viewing and Modifying Link Categories

Access the Link Category Definition page.



Link Category Definition page

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

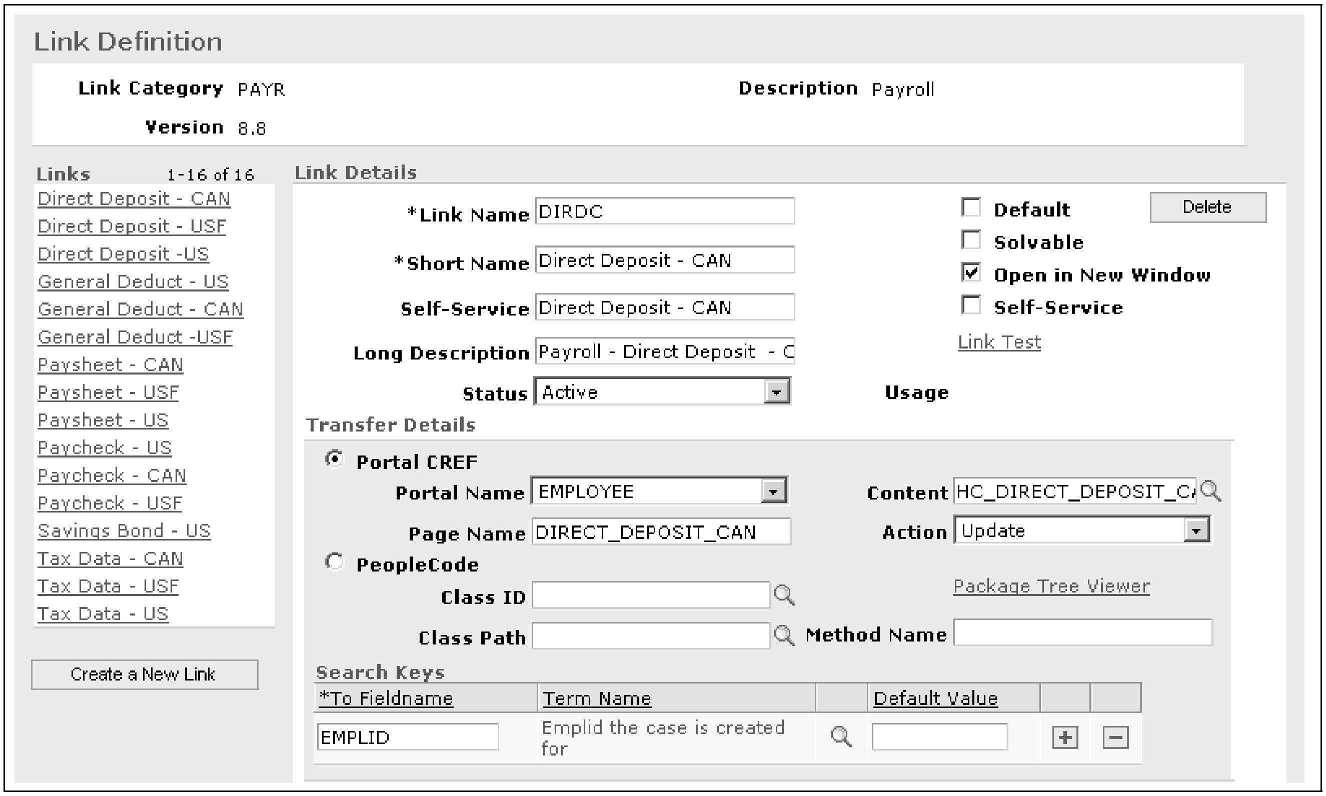
Active Flag Select either *Active* or *Inactive*.

Order Enter a number to indicate the order in which you want the item to appear on the Case page.

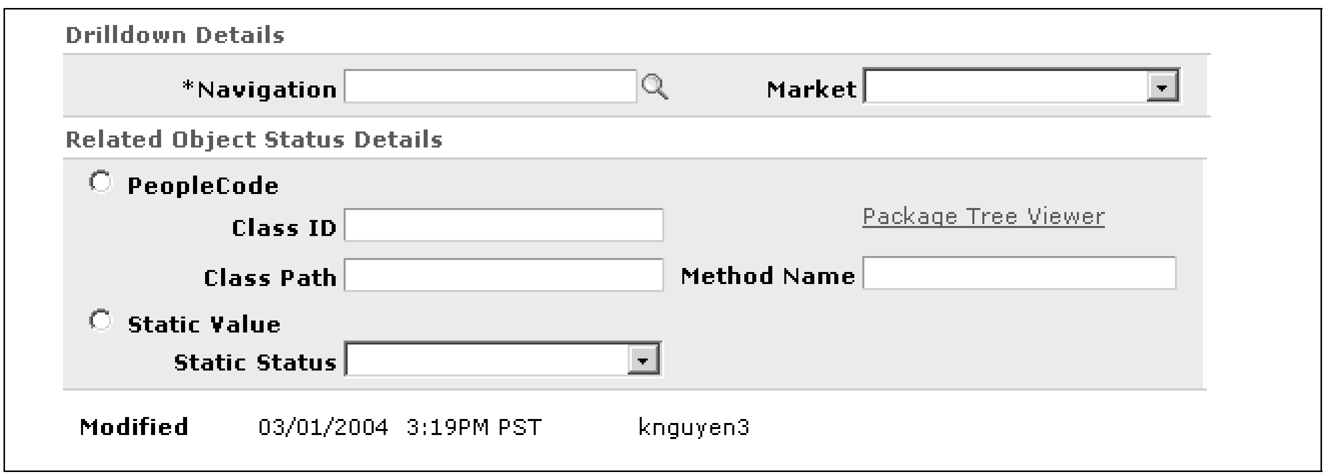
Note. To add new information, click the Add button at the end of the row.

Viewing and Modifying Link Definitions

Access the Link Definition page.



Link Definition page (1 of 2)



Link Definition (2 of 2)

Link Details

Link Name Enter a name for this link.

Short Name Enter a short name for this link definition. The value of this field is what appears on the Link Group definition.

Self-Service The value of this field is what appears on the self-service application.

Long Description Enter a long description.

Status Select either *Active* or *Inactive*.

Only the active link definitions will be included in the Link Category drop down list box on the Case page

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

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

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

Closing a case by performing an action is a manual press — if the agent performs an action that resolves the case, then the agent must change the case status to "Closed" and save the Case page. If the actions is marked as "Solvable" and the agent tries to close the case, then the following error message will appear: Associate a resolution before closing the case.

Note. All the Actions will be delivered as non-solvable out-of-the-box.

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 self-service applications.

Usage Displays the usage count. This value in this field increments each time the system adds the link to the Link Actions Taken for this Case group box in the Action Information group box on the Case page. To find out which links are used most often, you can write reports using this field.

Transfer Details

Portal CREF Select this option.

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

Content This is the actual content reference.

Action Select the page mode that will appear when the page is accessed. Values are Add, Correction, or Update.

PeopleCode Select this option 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.

To FieldName These fields identify the search keys that the system uses to access the linked component. These Search keys can be mentioned by associating

Terms of Active Analytics Framework. These Terms are resolved when an Action is performed from the Case page.

For example EMPILID (employee ID) is the search key used for most PeopleSoft HRMS transactions and is associated as Term to the Link Definition. A Term can be a Configurable Term, this Term when selected will appear as hyperlink in the Search Keys grid. User will have to click on the hyperlink will provide the value for the configurable Term. For example see Defect Workflow Link Definition in Related Actions Link category.

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 hyperlink.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* “Working with Active Analytics Framework,” Understanding Active Analytics Framework.

DrillDown Details

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

Navigation Select this option.

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

Related Action Status Details

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

PeopleCode Select the PeopleCode method to be invoked to capture the status of the action.

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.

Static Value Select this option if the static status value needs to be displayed for an action.

Static Status Select this static status value to be displayed for this link definition.

CHAPTER 6

Setting Up Change Management

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

- Set up the Change Management prompt tables.
- Set up Change Management business unit options.
- Set up Change Management defaults.
- Set up a phase template.
- Set up a status transition.
- Set up the task type role map.

Understanding Change Management Setup

You use Change Management codify and manage an organization's internal business processes. For example, a help desk might create use 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, which also manages the change process status, type, priority as well as key dates, impacted assets and products. This section discusses:

- Prompt tables in Change Management.
- System delivered component audit.
- Phase Templates.
- Status Transitions and the Active Analytics Framework.
- Task Type Role Map and the Assignment Engine.

See Chapter 13, "Using Change Management," page 195.

Change Request Prompt Tables

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. This is a list of the different types of prompt tables that you set up to use Change Management.

- Business Reason
- Category
- Impact
- Phase

- Priority
- Resolution
- Request Type
- Status
- Sub Type

Only the Request Type, Status, and Priority fields are required to save the change request.

Phase Templates

Each step in the change process consists of a phase. A phase comprises a taskor 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, they can load phases automatically using phase templates. This alternative allows the phase model to be automatically populated to the Phase Summary grid through selection the appropriate template from the Template drop down list box.

PeopleSoft offers functionality that allows this grid to be populated automatically based on the Type, Sub-Type, and Priority selected and displayed on the Change Request. Templates created via setup with matching Type, Sub-Type and Priority criteria and linked to the model when the model is built. can be autoloaded by leaving the model name drop down blank and clicking the Load button. Clicking the Load button without choosing a model from the drop down will allow any model matching the Type, Sub-Type, and Priority fields of the Change Request to be selected.

Transitions and the Active Analytics Framework

Much of the automatic functionality for controlling the process flow of a Change Request will be accomplished utilizing the AAF functionality. This will provide the most flexibility for configurable process flow of Change Requests. The Event Workflow setup will be configurable, and be implemented within both Change Management and Task Management applications. This will allow users to build rules as to who to notify, (what roles), when to notify them, (when which status or phase changes occur), and in what format, (email, worklist). It will also allow rules to be built that will notify all impacted parties when a Change is set to be implemented.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

Task Type Role Map and the Assignment Engine

In order for Change Management to know which roles are appropriate for a task, we will need to map task type to role. One-to-one mapping between task type and role is sufficient for Change Management. This is accomplished via the Task Type Role Map option in Setup CRM, Product Related, Change Management.

Common Element Used in this Chapter

SetID	Enter a setID. All of the prompt tables described in this chapter are associated with setIDs. This 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.

Setting Up Prompt Tables for Change Requests

This section discusses how to set up the following prompt tables:

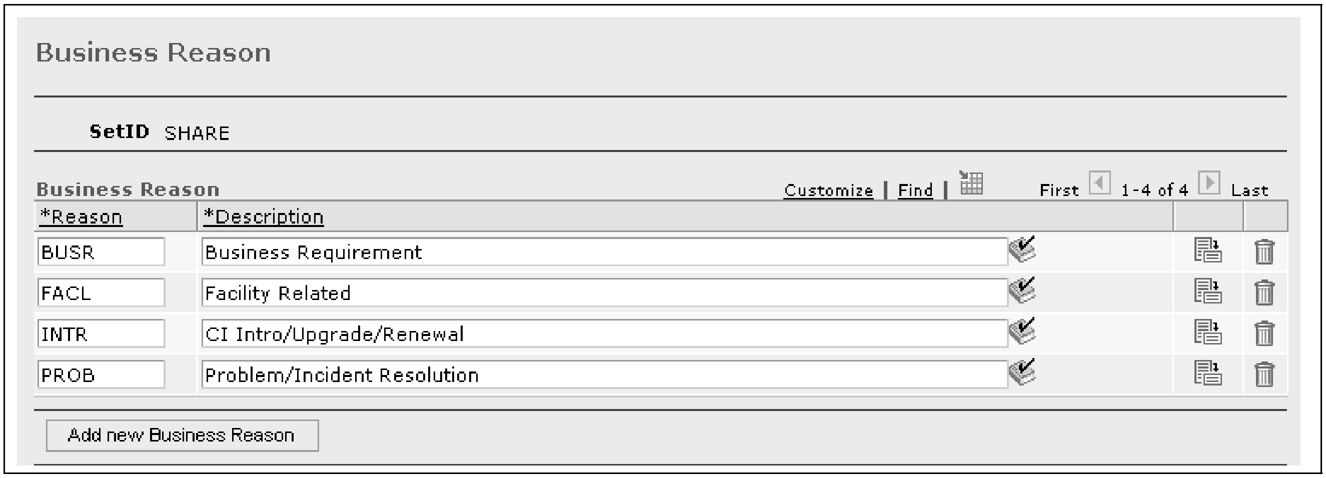
- Business Reason
- Category
- Impact
- Phase
- Priority
- Resolution
- Request Type
- Status
- Sub Type

Pages Used to Set Up Prompt Tables for Change Requests

Page Name	Object Name	Navigation	Usage
Business Reason	RG_UD_REQ_BUSR	Set Up CRM, Product Related, Change Management, Business Reason	Set up change request business reasons.
Category	RG_UD_REQ_CATGYE	Set Up CRM, Product Related, Change Management, Category	Set up change request categories.
Impact	RG_UD_REQ_IMPACT	Set Up CRM, Product Related, Change Management, Impact	Set up change request impact values.
Phase	RG_UD_REQ_STATE	Set Up CRM, Product Related, Change Management, Phase	Set up change request phases.
Priority	RG_UD_REQ_PRTY	Set Up CRM, Product Related, Change Management, Priority	Set up change request priorities.
Resolution	RG_UD_REQ_RESO	Set Up CRM, Product Related, Change Management, Resolution	Set up change request resolutions.
Request Type	RG_UD_REQ_TYPE	Set Up CRM, Product Related, Change Management, Type, Type	Set up change request types.
Status	RG_UD_REQ_STATUS	Set Up CRM, Product Related, Change Management, Status, Status	Set up change request statuses.
Sub Type	RG_UD_REQ_SUB_TYPE	Set Up CRM, Product Related, Change Management, Sub Type, Sub Type	Set up change request sub types.

Setting Up Business Reasons

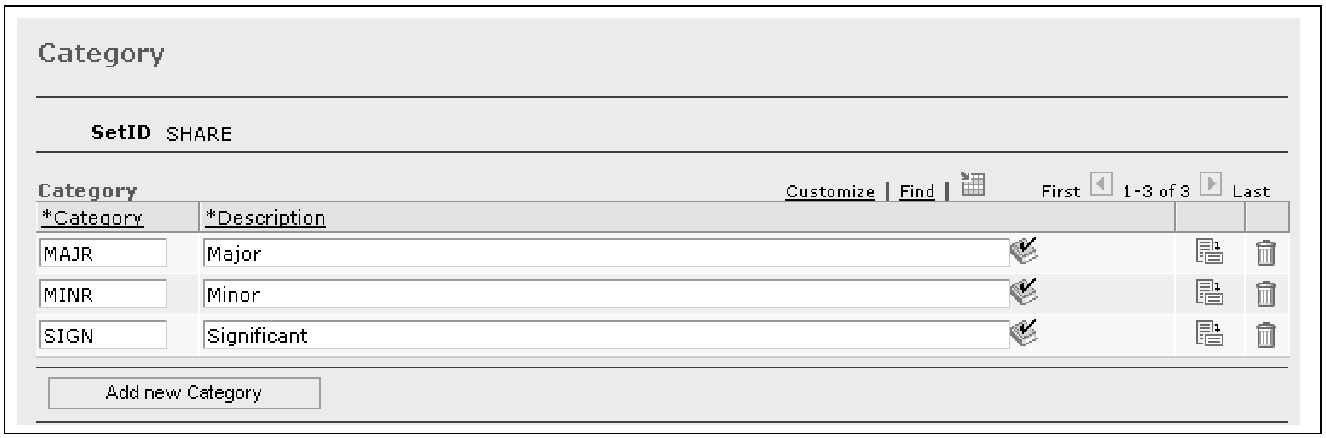
Access the Business Reason page:



Business Reason page

Setting Up Change Request Categories

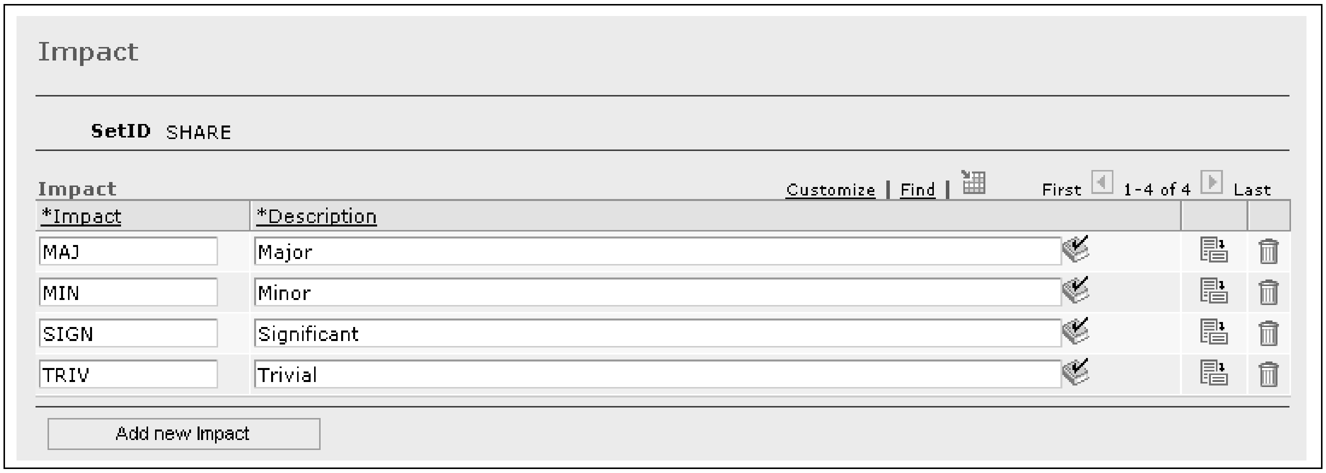
Access the Category page:



Category page

Setting Up Impact Values

Access the Impact page.



Impact

SetID SHARE

Impact — Customize | Find | First 1-4 of 4 Last

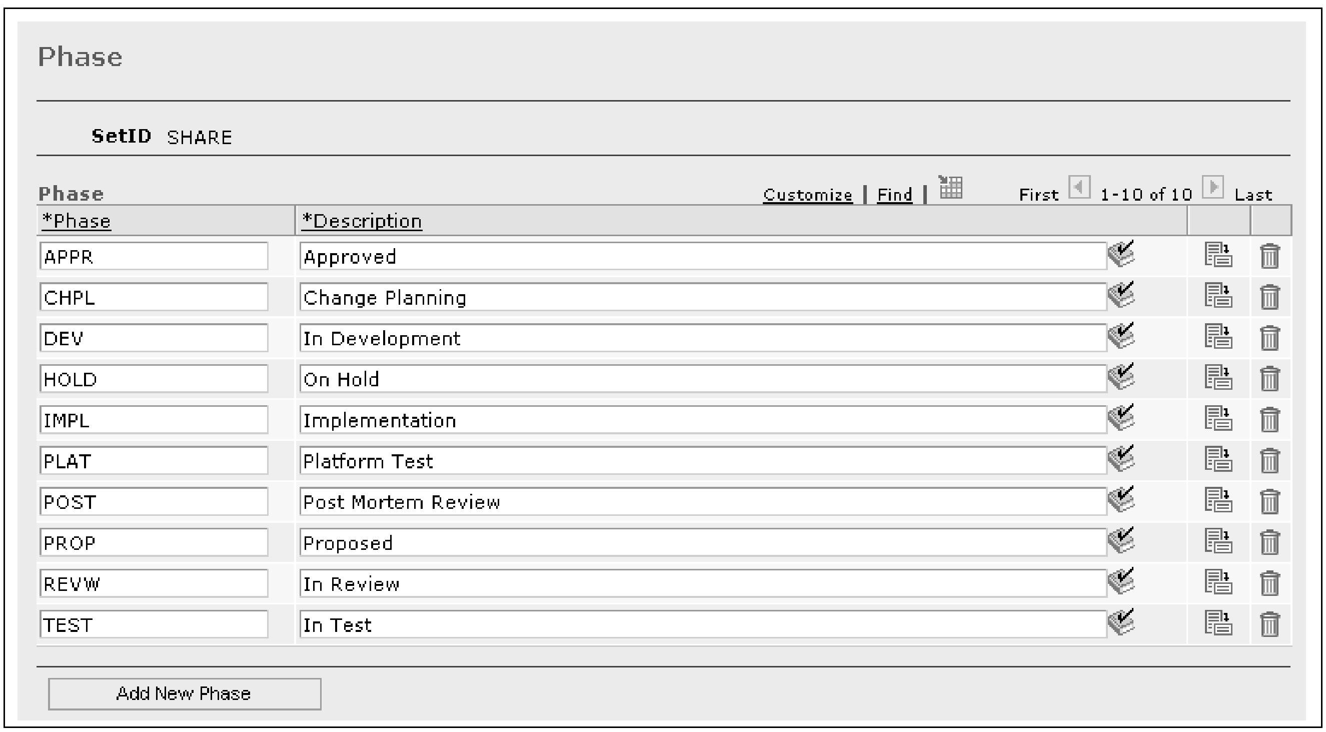
*Impact	*Description
MAJ	Major
MIN	Minor
SIGN	Significant
TRIV	Trivial

Add new Impact

Impact page

Setting Up Change Request Phases

Access the Phase page.



Phase

SetID SHARE

Phase — Customize | Find | First 1-10 of 10 Last

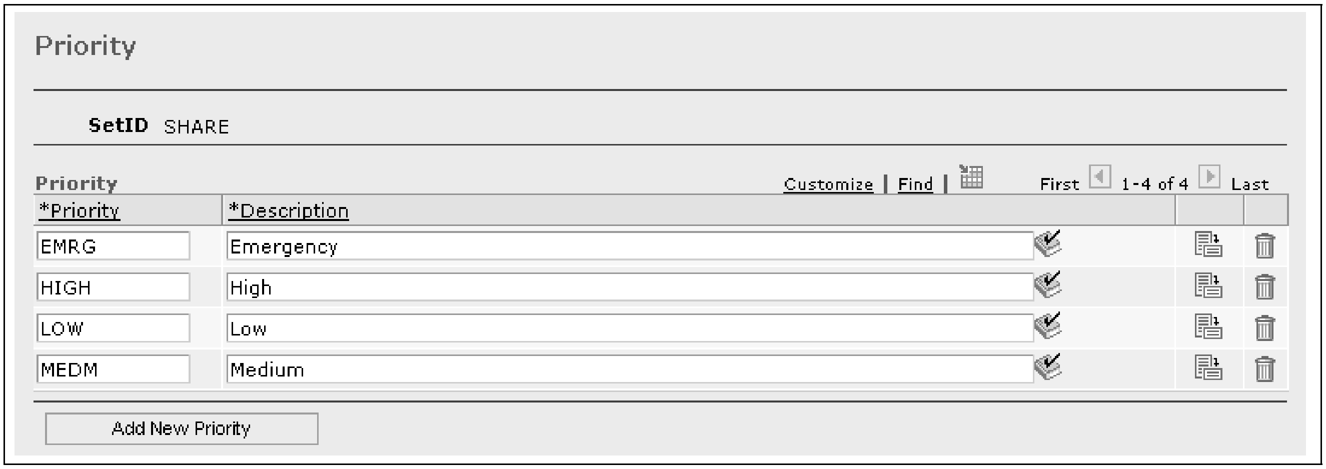
*Phase	*Description
APPR	Approved
CHPL	Change Planning
DEV	In Development
HOLD	On Hold
IMPL	Implementation
PLAT	Platform Test
POST	Post Mortem Review
PROP	Proposed
REVW	In Review
TEST	In Test

Add New Phase

Phase page

Setting Up Change Request Priorities

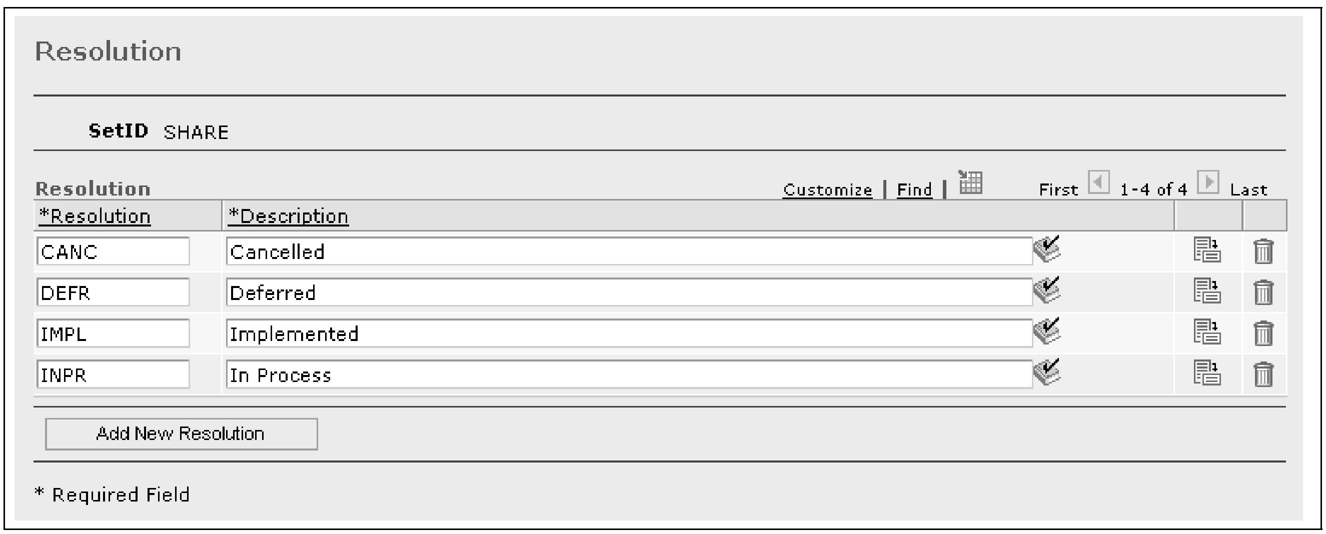
Access the Priority page.



Priority page

Setting Up Change Request Resolutions

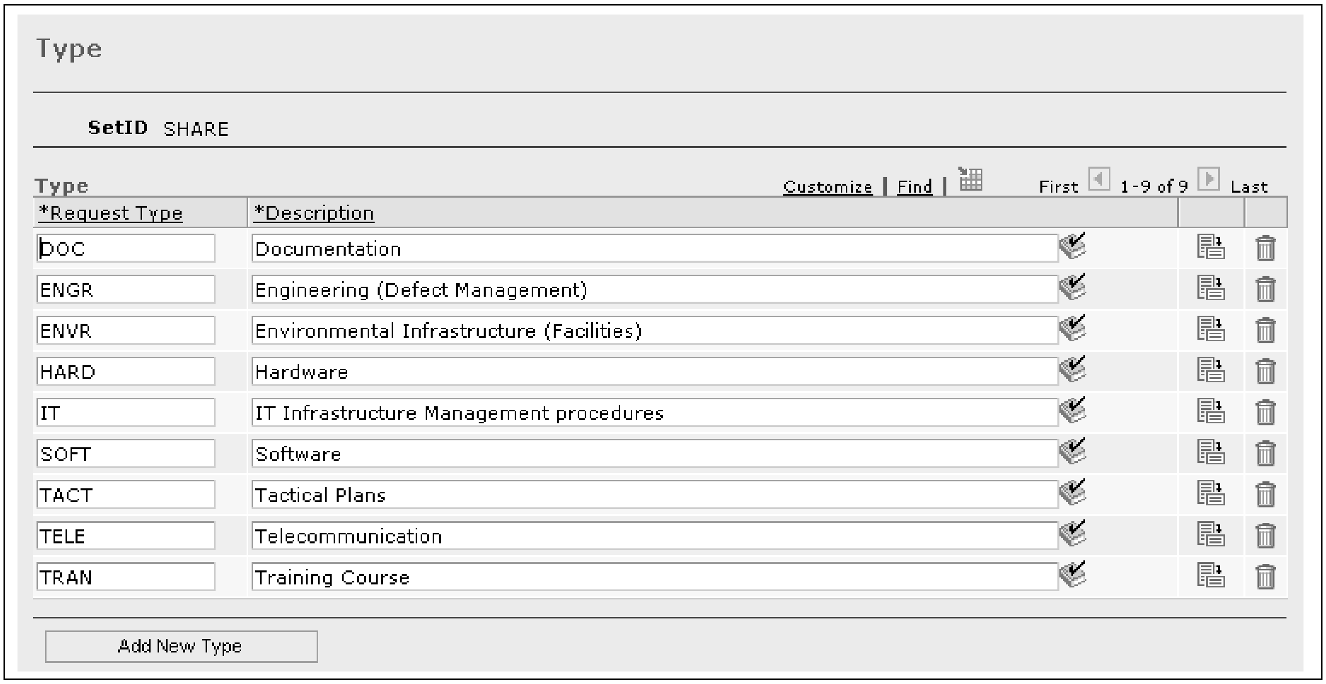
Access the Resolution page.



Resolution page

Setting Up Change Request Types

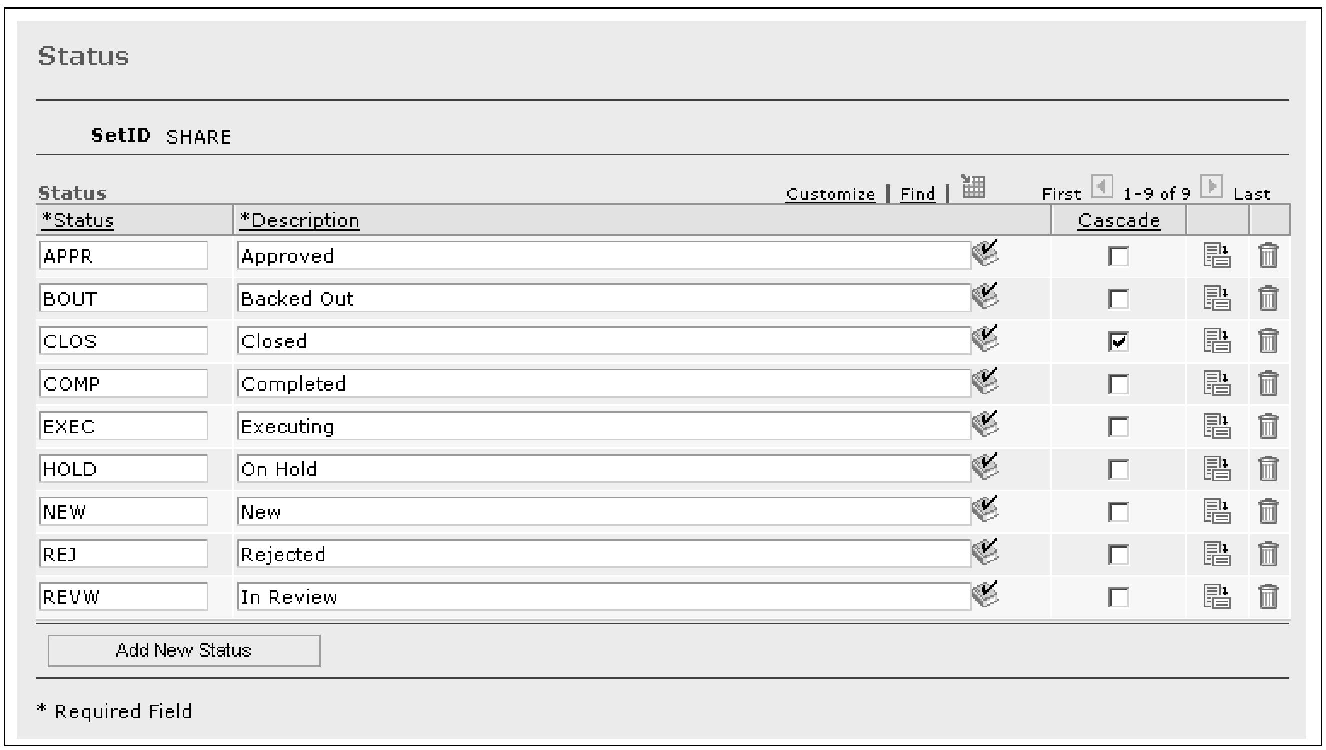
Access the Type page.



Type page

Setting Up Change Request Statuses

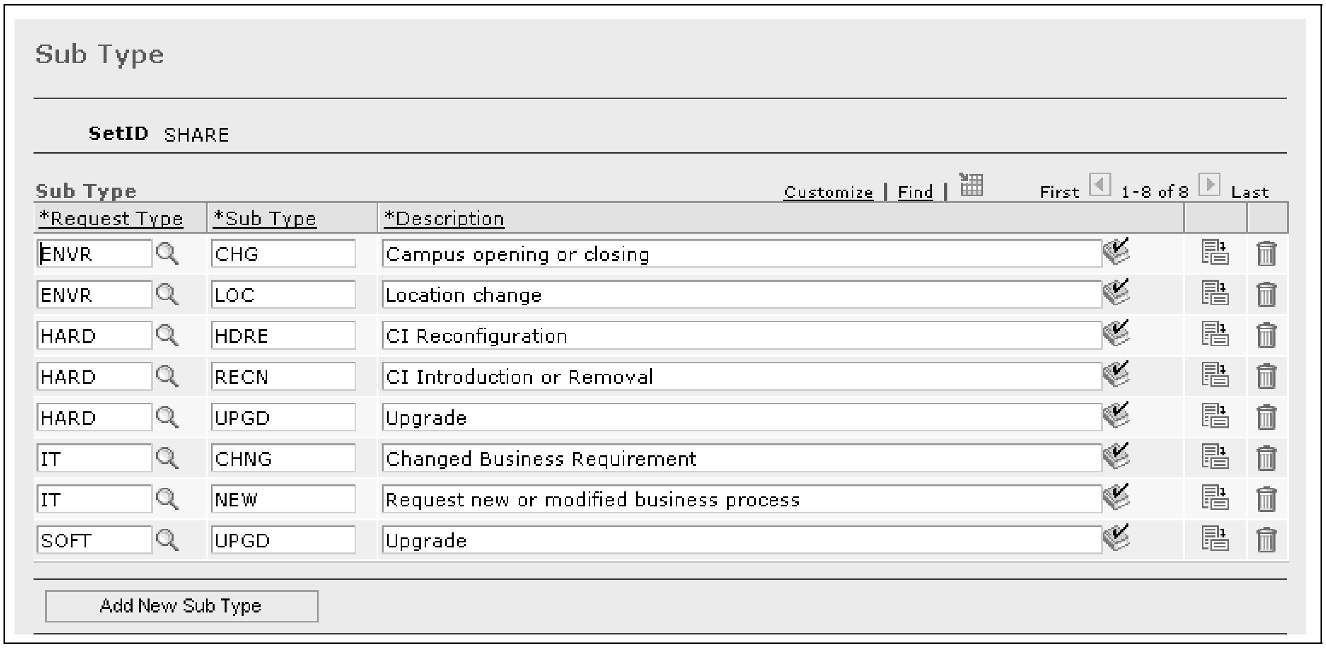
Access the Status page.



Status page

Setting Up Change Request Sub Types

Access the Sub Type page.


Sub Type

SetID SHARE

Sub Type

Customize | 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

Sub Type page

Request Type Select a Request Type.

Sub Type Enter a sub type.

Setting Up Change Management Business Units

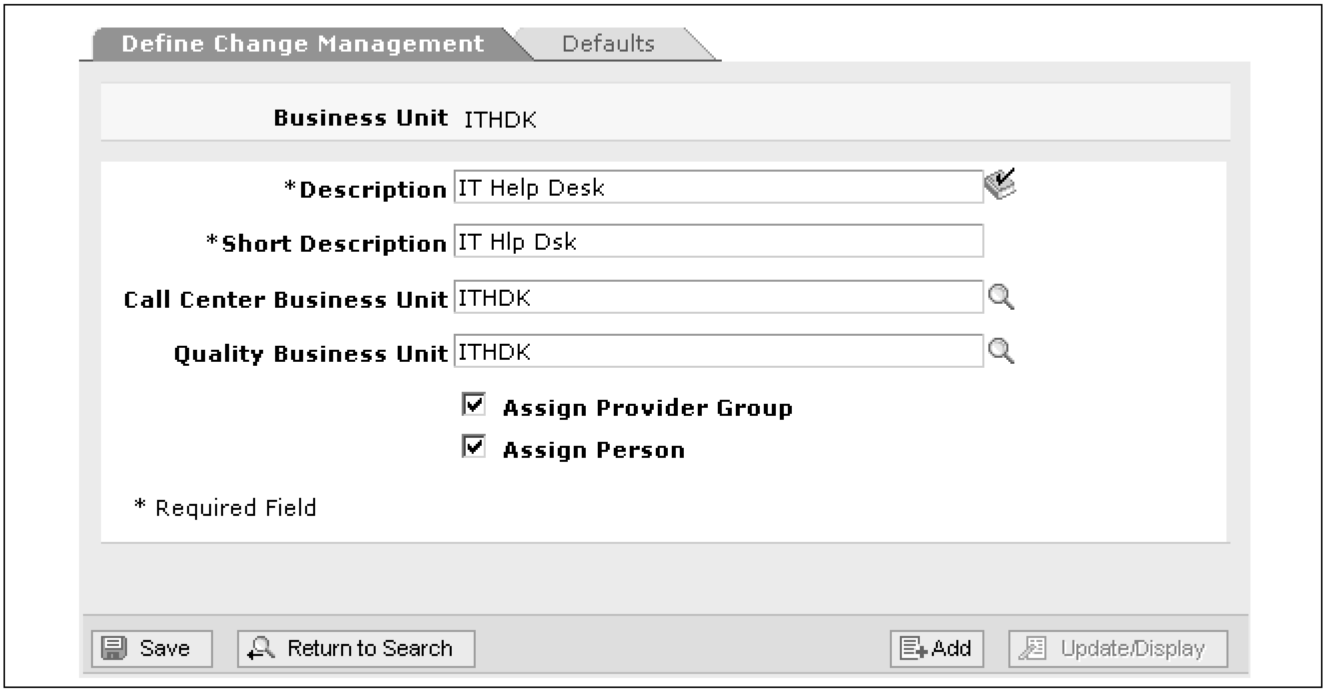
This section discusses how to set up Change Management business units.

Pages used to Set Up Change Management Business Units

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

Setting Up Change Management Business Units

Access the Define Change Management page.



Define Change Management page

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

Short Description Enter the description that appears on the Case page and other places where the business unit appears.

Call Center Business Unit Enter the default PeopleSoft Quality Management business unit to use when selecting a case to relate to a change request.

Call Center Business Unit Enter the default PeopleSoft Quality Management business unit to use when selecting a case to relate to a change request.

Assign Provider Group Select this check box to use assignment engine functionality when assigning a provider group to degenerated phases and task.

Assign Person Select this check box to use assignment engine functionality when assigning a person to autogenerated phases and task.

Setting Up Change Management Defaults

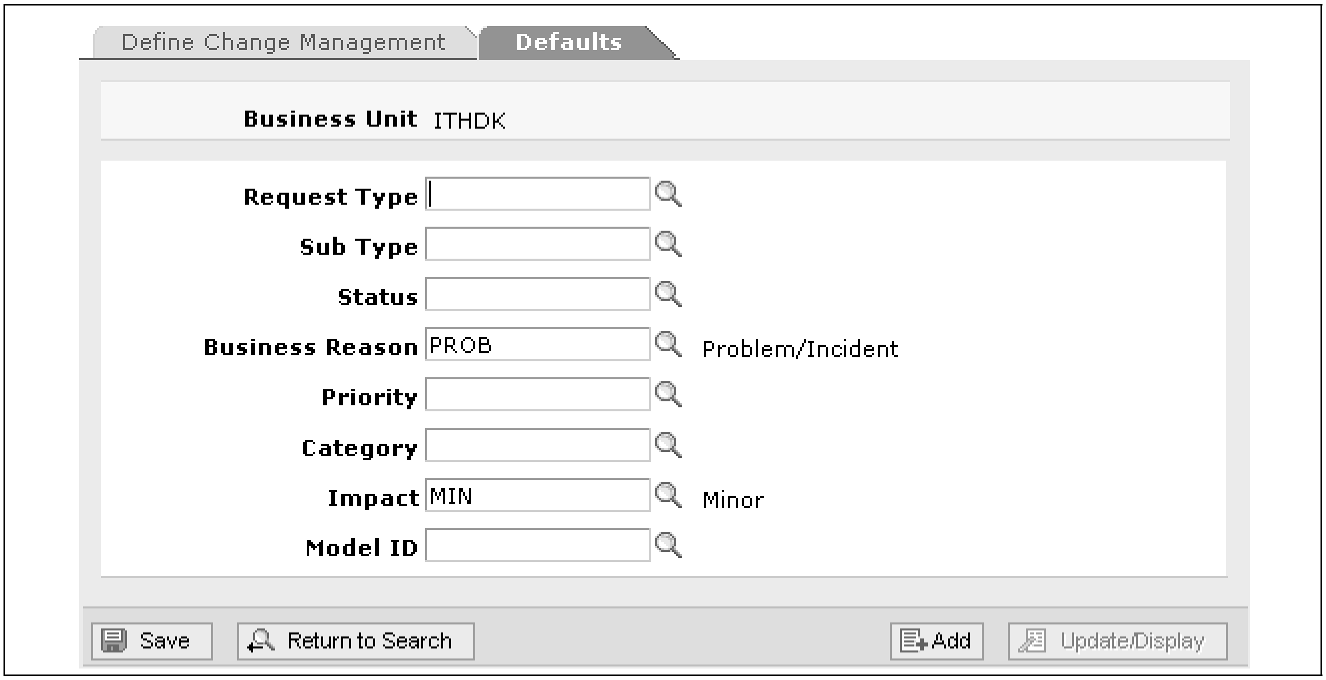
This section discusses how to set up Change Management business units.

Pages used to Set Up Change Management Defaults

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

Setting Up Change Management Business Units

Access the Change Management Business Units– Defaults page:



Defaults page

Request Type The default request type for a new change request.

Sub Type The default sub type for a new change request.

Status The default status for a new change request.

Priority The default Priority for a new change request.

Category The default Category for a new change request.

Impact The default case type for a new case.

Template ID The default template ID for a new change request.

Setting Up Phase Templates

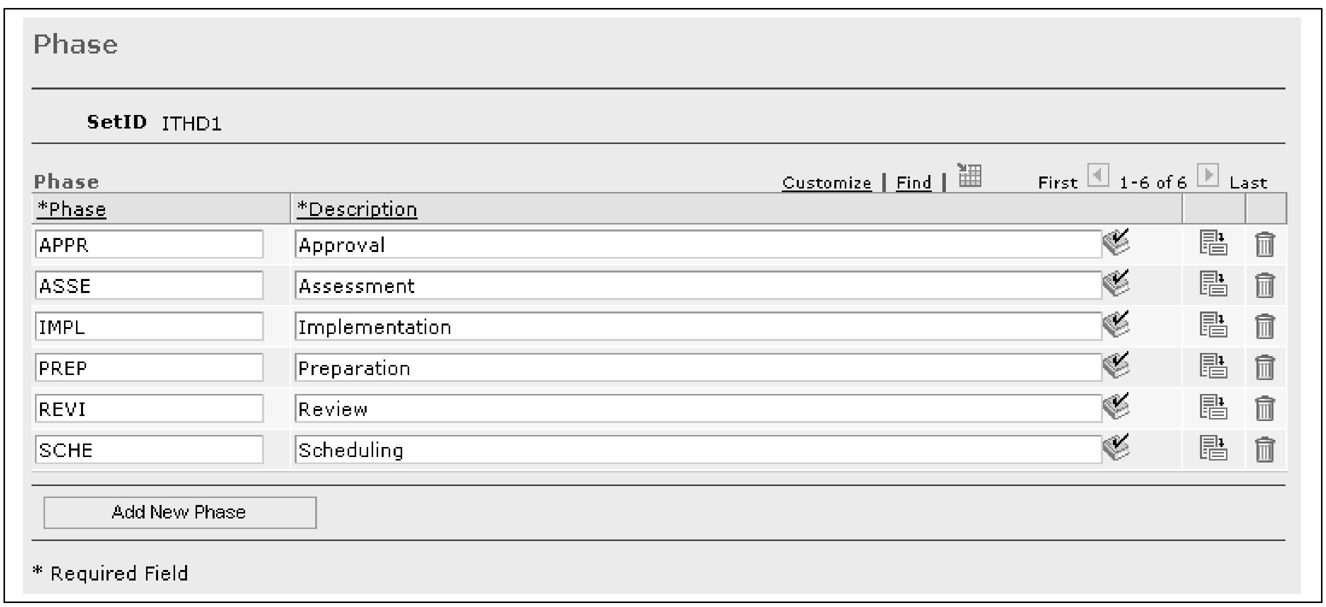
This section discusses how to set up a phase model.

Pages used to Create a Phase Template

Page Name	Object Name	Navigation	Usage
Phase	RG_UD_REQ_STATE	Set Up CRM, Product Related, Change Management, Phase	Create phases. Theses phases appear in the Phase drop down list box on the Phase Template page.
Task Group Template	RB_TSK_GRP_TPL	Set Up CRM, Common Definition, Task Management, Task Group Template, Task Group Template	Define task group templates. You associate a task group template to a phase on the Phase Template page. See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Tasks”.
Phase Template	RG_UD_PHS_MODEL	Set Up CRM, Product Related, Change Management, Phase Model, Model	Create the phase model. Identify the phases and the phases’ task group templates that are to be associated to the phase model.

Creating Phases

Access the Phase page.



Phase page

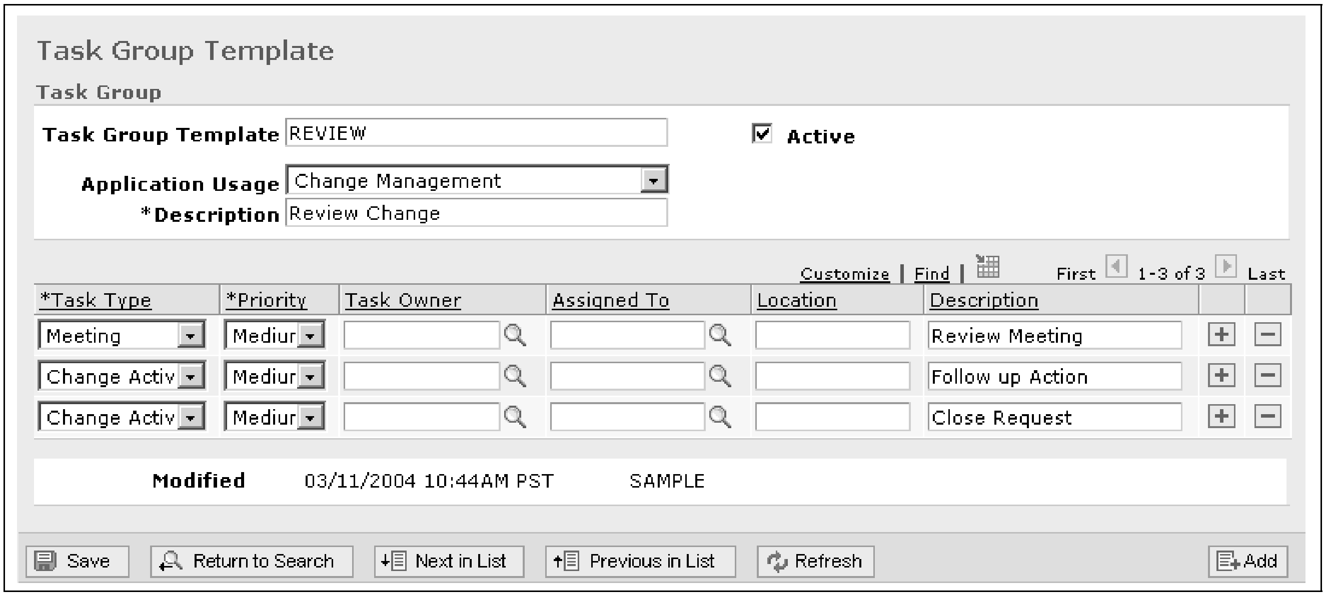
Phase

Add New Phase Click to add a new phase to for this setID.

This phase will appear on the Phase drop down list box on the Phase Model page.

Defining Task Group Templates

Access the Task Group Template page.

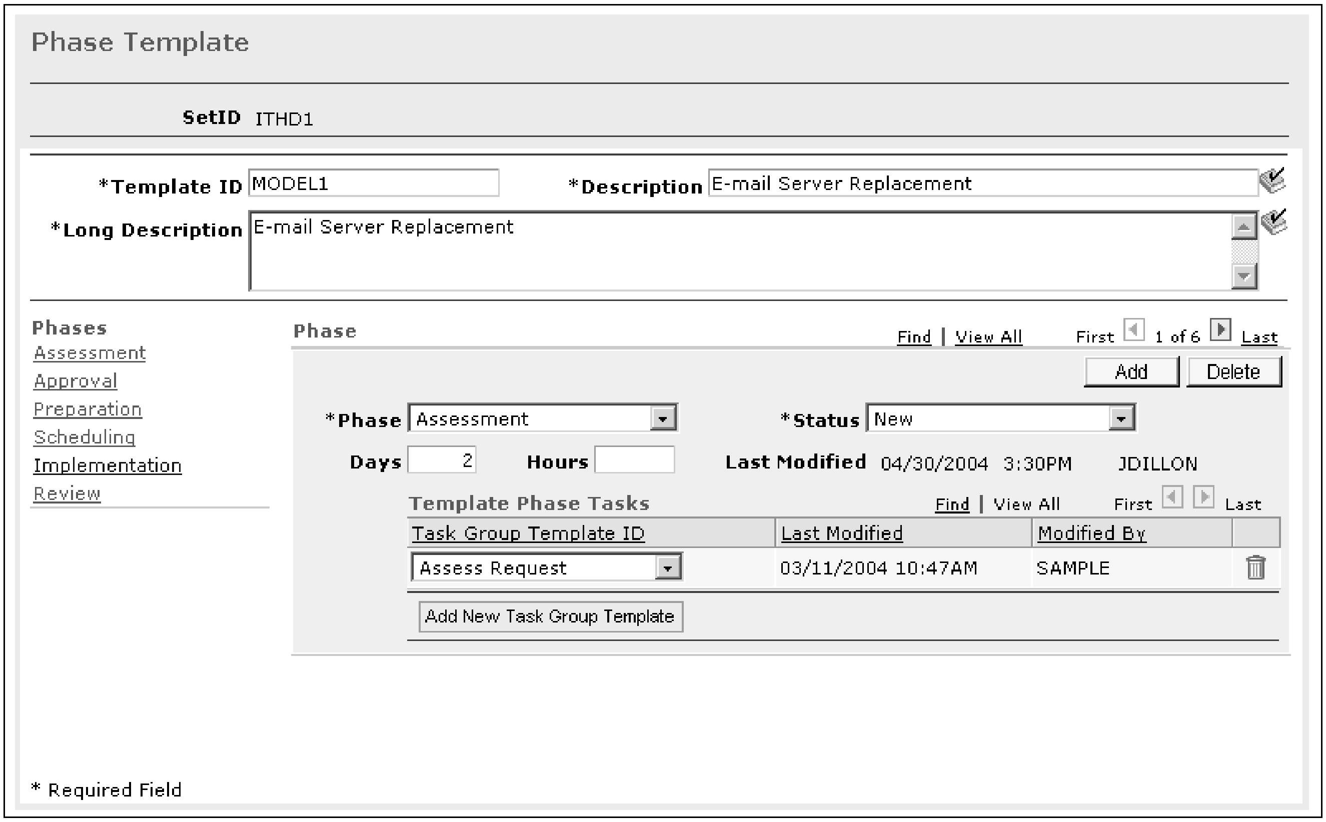


Task Group Template page

Specify the default type, priority, assignee, and location of each tasks that is part of the task group.

Defining Phase Templates

Access the Phase Template page.



Phase Template page

Phase Select a phase to be associated to this phase template. Phases are set up in Set up CRM, Change Management.

Status Select a status. This status will be associated to the task or series of tasks that are tied to this phase.

Setting the Task Type Role Map

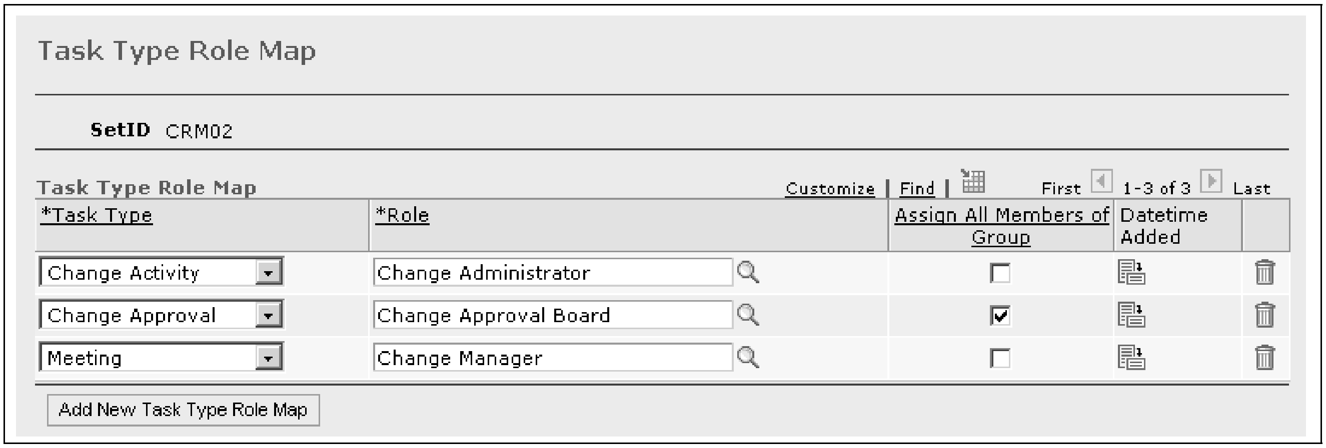
This section discusses how to set up Task Type Role map.

Pages used to Create a Phase Template

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

Setting the Task Type Role Map

Access the Task Type Role Map page.



Task Type Role Map page

Task Type Role Map

Task Type Select a task type.

Role Select a management role.

Assign All Members of Group Select if you want all members of a provider group to be associated with a particular task type.

CHAPTER 7

Defining EIP Options for Integration to PeopleSoft HRMS

This chapter provides an overview of the integration between PeopleSoft Customer Relationship Management (PeopleSoft CRM) and PeopleSoft Human Resources Management (PeopleSoft HRMS) and discusses how to define EIP (Enterprise Integration Point) options.

Understanding the Integration Between PeopleSoft CRM and HRMS

This section discusses:

- EIP message process.
- Request message.
- Response message.
- Inactive worker data.

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 sync request is sent to PeopleSoft HRMS.

When PeopleSoft HRMS validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by a run-time sync request and response.

Each time an agent accesses an employee record from the 360 Degree View search page, the system triggers a run time EIP. For security reasons the information is not saved into the PeopleSoft CRM database.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Using the 360-Degree View”.

Request Message

The system sends a secured sync request message from PeopleSoft CRM to PeopleSoft HRMS. The system validates the requestor’s information before the system processes the request. It contains this information:

- Authentication cookie.

  This is a PeopleSoft-provided authentication token for the purpose of single sign on. PeopleSoft CRM transfers this cookie to PeopleSoft HRMS, so that it can call the SwitchUser function to get a valid user. The system then uses the cookie to validate security access in PeopleSoft HRMS before it provides service.

- EmplID (employee ID) from the 360 Degree View search page.
- As of date.

  This is the date that is passed for effective-dated components in PeopleSoft HRMS. The default value is*%date* (today's date). The system can use this to query information from past dates.
- Language.

  This is the language that the agent used to log into the application. The default value is *(%language)*. PeopleSoft HRMS retrieves information based on the language code in the request for internationalization support.

PeopleSoft delivers the following sections with a Y (yes) selected as the default. It notifies PeopleSoft HRMS to request information for the section. You can select or clear these options in the installation setup for your organization as a whole. For example, if your organization doesn't use PeopleSoft Payroll, clear the selection.

- Job section.
- Benefits beneficiary section.
- Payroll section.
- Direct reports section.

Response Message

Sync response from PeopleSoft HRMS contains a response to the information provided in the request. The system displays all error messages provided by PeopleSoft HRMS (including the denial of access).

Note. You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft HRMS as well as grant security access to the information. Depending on the setup in PeopleSoft HRMS, a user ID may not have access to all of the information. If that's the case, the response returned from PeopleSoft HRMS will contain an error message, such as *Secured* for certain information.

Inactive Worker Data

The system can message only active worker data to PeopleSoft HelpDesk for Human Resources from PeopleSoft HRMS.

You can, however, configure the system to bring inactive worker statuses into PeopleSoft CRM. In addition to *Active* status, there are 11 worker statuses used in PeopleSoft HRMS that you can select on the Worker Statuses to EIP setup page. Options include: *Deceased, Retired,* and *Leave of Absence.*

Defining EIP Options

This section discusses how to:

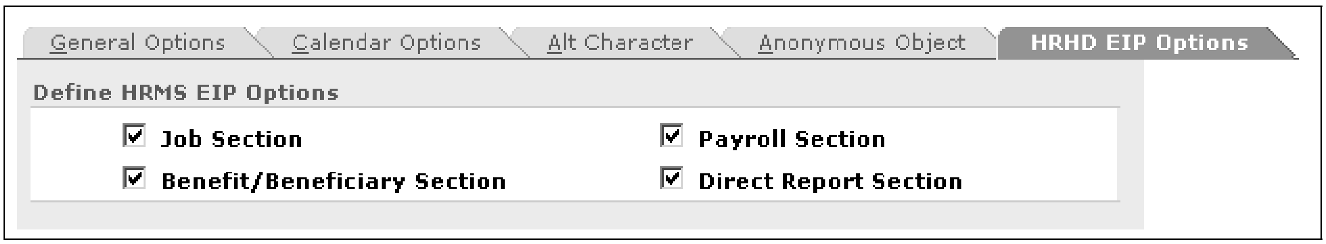
- Activate and deactivate EIP subscription options.
- Bring inactive worker statuses into PeopleSoft CRM.

Pages Used to Define EIP Options

Page Name	Object Name	Navigation	Usage
HRHD EIP Options	RC_HR_INSTALLATION	Set Up CRM, Install, Installation Options, HRHD EIP Options	Activate and deactivate the subscription options that you want to display on the 360 Degree View page for PeopleSoft HelpDesk for Human Resources.
Worker Statuses to EIP (worker statuses to enterprise integration points)	RB_WRKR_EIP_OPN	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Worker Statuses	Bring inactive worker statuses into PeopleSoft CRM.

Activate and Deactivate EIP Subscription Options

Access the HRHD EIP Options page.



HRHD EIP Options page

All of the check boxes on this page are selected by default. Clear the check boxes associated with the sections that you don't want to display on the 360 Degree View page for PeopleSoft HelpDesk for Human Resources. Click Save.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Using the 360-Degree View"

Bringing Inactive Worker Statuses Into PeopleSoft CRM

Access the Worker Statuses to EIP page.

Worker Statuses to EIP page

Select all of the check boxes associated with the worker statuses that you want available in the PeopleSoft HelpDesk for Human Resources application. HRMS. Click Save.

The system creates workers with the statuses that you selected 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.

PART 2

Business Processes

CHAPTER 8

Managing Cases

This chapter provides overviews of the configurable case, case access, case management and discusses how to:

- Access new and existing cases.
- Manage basic case information.
- Validate errors reported by callers.

See Also

Chapter 9, “Processing Cases,” page 139

Understanding the Configurable Case

In this release, one Case component supports all call center applications and industry solutions. Display Templates that are associated with the Case component control the appearance and behavior of the Case component and its pages to support the varied business needs of the call center applications. Implementers can choose to show or hide pages, sections, fields, and can control field labels.

This new technology replaces the Page Configurator of previous versions that was used to hide and display fields in the self-service application case component.

Understanding Case Access

This section discusses:

- Case creation.
- Existing case retrieval.
- Saved searches.

Case Creation

There are several methods for creating new cases:

- The basic method for creating a new case is to navigate to your call center application (Support, HelpDesk, or HR HelpDesk) and select Create a Case.

  When users want to add new cases, they will be taken directly to the Case component in Add mode. Users can search for customers/employees directly on the Case page, thus increasing efficiency and usability—users can enter information about the case before identifying the customer.

- Quick Create.

  You can use the Quick Create function to provide service quickly to create new customers, consumers, contacts, and workers.

- Use a computer telephony integration (CTI) system to identify a caller.

  The CTI system enters caller information on the 360-Degree View page. From there you can access the Add a New Case page to create a new case. The system populates customer or contact information on this page from the 360-Degree View page.

- 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 use the identify the caller from the new case page.

- If agents enable the view option for the Agent – My Cases pagelet, they 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. Cases include standard Support and HelpDesk cases as well as those that are specific to industry solutions.

  See *PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook*, "PeopleSoft ERMS".

See *PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook*, "PeopleSoft CRM CTI"; *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Using the 360-Degree View," Accessing the 360-Degree View and Chapter 9, "Processing Cases," Managing Related Cases, page 148.

Default Contact Information

When you create a new case, the system enters default contact information for the caller.

When both the customer and contact are selected, the contact information is obtained from the contact's preferred primary phone and email information.

Case Retrieval

To access an existing case, you can access it directly from your My Cases pagelet, or you 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 to use in searching for cases is determined in the Configurable Search Definition, which is associated to the Display Template.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates" and *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages".

If you use CTI to access the Case page, the system normally bypasses the Case Search page because the CTI system provides the data that would otherwise be found through the search mechanism. However, if a caller provides an invalid case number, the system cannot go directly to the Case page. Instead, it displays the Case Search page and enters the data that is provided by CTI into the search fields. Because the appearance of the Case Search page indicates that the case number is invalid, you must delete the invalid case number before performing the search.

Note. When a case is secure , only agents in the assigned provider group have authorization to open the case. If you use CTI 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 CTI routing rule.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Understanding Call Center Business Units, page 9

PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, "Configuring CTI Application Pages"

PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook, "Working with CRM Employee-Facing Pagelets," Using PeopleSoft Support Pagelets

Saved Searches

Saved searches enable you to reuse case search criteria. Searches are saved under your user ID; the system maintains separate lists of saved searches for each user as well as separate lists of searches for PeopleSoft Customer Relationship Management (PeopleSoft CRM) call center applications.

The behavior of the saved search depends on how the search page was set up on the Configurable Search Setup page. The system administrator can choose to populate the results grid automatically with the most recently used search criteria or with the user's default saved search. If the administrator selects the check box that enables users to choose how the results grid is initialized, then users have the option to:

- Save search criteria.
- Personalize available search fields.
- Decide how the results grid is initialized.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Configuring Search Pages," BO Searches on Configurable Search Pages

Understanding Case Management

This section discusses:

- Case page activities.
- Quick Code.
- Case Information Security.
- Product Identification.

- Case toolbar functions.
- Upsell opportunities.
- Case closure.

Note. This chapter discusses the case page activities. Subsequent chapters discuss additional case processing that take place on other pages in the Case component.

Case Management Activities

Depending on the display template, the Case page can be divided into the following sections:

- Partner Information
- Customer Information*
- Problem*
- Case Information*
- Actions*
- Add a Note
- Incident Address
- Dispute Information
- Complaint Details

Note. Sections marked with an asterisk (*) are delivered enabled out of the box. The display template controls the visibility of the other sections.

See Chapter 9, “Processing Cases,” page 139.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates,” Configuring Display Templates for Components.

Partner Section Information

Partner section options appear on the display templates only if PeopleSoft Enterprise Partner Relationship Management is installed. To display the options on the case page, you must select the desired options from the Partner section. You can elect to display the options grouped in a section of the case page or as separate fields (such as Partner and Partner Contact) on the Case information (Main sub-page) of the case page.

If you have purchased PeopleSoft Enterprise PRM for Service, the display template contains partner section and field options, which are delivered disabled. There are two display layout options: on the Case Information section or as its own “Partner” section on the case page. There is no benefit to using both layout options.

Customer Information

In the Support application, the case’s Customer Information section contains Customer fields; the same section for a HelpDesk or HR HelpDesk case contains Employee fields.

Consider the following when using the Customer Information section:

- If you are searching for a company, you can enter a partial value of the company’s name and click the Search button. The system returns a list of companies that begin with the value you entered in the Company field. If there is only one company that matches your search, a page with all of the contacts for that particular company appears. 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 fields and click the Search button. Do not enter anything in the Company field.
- If you want to edit a contact's contact method, click the Edit hyperlink to launch the Contact Detail page. This page lists the contact information for the selected contact. Only address information is listed for HR Helpdesk cases.
- The display of Customer search fields and some of the display fields are controlled by the Business Object Search.

  See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Setting Up Business Object Search and Quick Create," Understanding BO Search and Quick Create Setup.

The Customer Section is grouped using an "Expandable Group Box" layout. Use the display template to control which fields are displayed in which section.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

Problem Section

This section consists of two fields: the Problem Summary and the Problem Descriptionfields.

The Problem Summary field is required.

The system can be configured so that values for the Problem 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 Problem Summary and Description.

Case Information Section

The fields on the Case Information section are grouped using the configurable "Embedded Tabs" section layout—by default, the Main and More tabs. Use the display template to determine the number of tabs, their labels, and the fields to be displayed on them.

In this section, you can:

- 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.

Note. 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.

There are many ways to assign a case. You can configure the system to automatically suggest a provider group and/or 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.

  Track company equipment with identification numbers, and whether it is installed.

- Track the reported problem.

  You can prioritize and categorize it by type and severity, create and assign error codes and messages to attach to it, and record the response and outcome.

- Perform an entitlement search.

  PeopleSoft call center applications enables you to set up agreements and warranties that govern and track customers' and employees' entitlement to support.

- Authorize a credit card.

Actions Section

The link categories that you or your implementation team set up during installation appear in the Actions section on the main Case and Summary pages. You can link to pages such as those in the Human Resources database (used in HR Helpdesk), or you can link to Related Actions.

By using the Active Analytics Framework or by selecting a quick code, you can configure your system to automatically suggest an action. If you manually select an action, you can do so from the Actions section, or you can access the Related Action page on the Case component.

Only those link categories and definitions that are associated to a link group —which is associated to a display template—appear in the Actions section.

See Chapter 5, "Setting Up Links to PeopleSoft HRMS Pages and Related Actions," Viewing and Modifying Link Groups , page 70.

Add a Notes Section

Delivered hidden, the Add a Notes section allows you to provide agents with a note field right on the main case page, saving them the time and extra steps of clicking to display the Notes and Attachment or Summary pages. In addition, agents can edit an existing note. However, agents must use the Notes and Attachments tab for attachments.

See Chapter 9, "Processing Cases," Adding Notes and Attachments, page 143.

Incident Address Section

This section is delivered hidden. If you want the Incident Address section visible, modify the display template to enable this section.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

In the Incident Address group box, you record information about the location of the incident.

In this group box, you can:

- Enter either a street address or the intersection for the incident.

If the system is integrated with Environmental Systems Research Institute (ESRI) software to generate maps, the address must include at least the Address 1 field and the zip code. Location by intersection requires two cross streets.

- Describe additional information about the location using free-form text.

Dispute Information

If you have purchased the PeopleSoft CRM Communications solution, you can enable the display of information, fields, and action links specific to the recording of complaint calls concerning telecom services:

- A dispute information section, offering a selection of fields and details specific to handling billing disputes, for example:
  - Bill date and period.
  - Adjustment type and amount.
  - Reason for the dispute.
- A communications-specific case search definition.
- A set of industry-specific action links.

  Actions are:
  - Create RMA (return materials agreements)
  - Create Workflow
  - Defect – Create New
  - Defect – Relate
  - Sales Lead
  - Sales Order
  - Service Order

When enabled, the Dispute Information section appears when the Case Type is *Bill Dispute*, which is an option available only in the telecommunications solution.

Complaint Information

Although not exclusive of all other call center applications, he Complaint Information section is designed for support response in the insurance and financial services environment:

- A Complaint Details section, offering a selection of specific fields and details, for example:
  - A description of the cause.
  - Reimbursement information.
  - Communications records.
  - Personnel involved.
  - Checkboxes for followup actions.
- An industry-specific case search definition.
- An set of action links for insurance and financial product support.

  Action links are Create Workflow and Sales Lead.

  Actions are:

- Create RMA (return materials agreements)
- Create Workflow
- Defect – Create New
- Defect – Relate
- Sales Lead
- Sales Order
- Service Order

To specify the display of complaint information, select *Complaint* for the Case Type on the case. Make sure that the section is enabled on the Case display template General Options section.

See Also

Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” Link Definitions, page 53

Quick Code

You can use quick codes to populate the following fields on the Case page:

- Summary
- Description
- Status
- Priority
- Impact
- Severity
- Provider Group
- Assigned To
- Case Type
- Category
- Type
- Detail
- Error Code
- Error Message
- Interested Parties
- Notes
- Product ID
- Search Solution Keyword
- Suggested Action

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 the case can be saved. 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.

  There are two case nodes in the 360-Degree View page for PeopleSoft HelpDesk for Human Resources; one for cases that cannot be accesses, and one for those that can.

  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. PeopleSoft, however, delivers this node without that information.

- Related Cases.
- Solution - Related Actions.
- Solution Advisor.

  Secured appears in the search results grid.

- Worklist.

  Secured appears if the agent is not in the provider group.

- Email notifications (automated and manual).

  To prevent unauthorized individuals from receiving email on secured cases, create a role query. PeopleSoft Workflow uses role queries to determine which users should receive work items. The summary, however, does not change for email notifications regarding secured cases.

  See *PeopleSoft Workflow*

  See *PeopleSoft Query*

Note. When an agent prompts for cases, the system displays only those cases that the agent is authorized to access. In order 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 Active Analytics Framework (AAF), business projects, workflow actions, and email templates, you can use the SECURE_CASE_FLG field in the RC_CASE record to define record field conditions.

For example, suppose that you wanted to suppress secured cases from being viewed by unauthorized users. You could 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.

Case Assignments

You can assign a case to any worker (except future-dated workers). The worker to whom a case is assigned is considered 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 is the appropriate level 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 as well.

  You can set up the assignment engine to assign cases to provider groups according to the competencies associated with problem types and then assign cases to agents according to the competencies associated with category, type, and detail.

  See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up and Performing Assignment Searches”.

  Note. Based on how you configure the system, the assignment engine will also uses product, customer, region, and location information.

- Entering a quick code.

  You can enter a quick code that is associated with a default assignee (either a provider group or an agent).

- Having the system assign the case at save time.

  auto-assignment options that are configured in the Call Center BU (call center business unit) component occur only if you have not already assigned the case. If you use Active Analytics Framework (AAF) to assign the case, the event definitions determine the conditions under which the assignment occurs.

Assignment Notifications

PeopleSoft 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 PeopleSoft's Active Analytics Framework 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.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," Defining Call Center Business Units, page 12

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up and Maintaining Provider Groups and Group Members," Understanding Provider Groups and Group Members

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Case Closure

TheCase 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 BU - Case Defaults page to change the status automatically when an agent obtains a successful resolution.

  See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 9.
- 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.
- Unless a case is associated with a business project, cases must be resolved or a solvable action applied before they can be closed. You cannot reopen the resolution unless you also reopen the case.

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 service order.
  - 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 where multiple resolutions can close a case for that business unit.

See Also

Chapter 2, “Defining Call Center Business Units and Display Template Options,” page 9

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, “Using Solutions,” Understanding Case, Service Order, and Defect Resolution

Case Toolbar Functions

The toolbar at the top of all of the pages in the Case component provides access to several common activities. The toolbar is configurable; these activities are available only if the toolbar is active.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Toolbars”.

PeopleSoft delivers configurable toolbar definitions—there is one for each application.

Common Call Center Toolbar Buttons

The configurable toolbar in all call center applications contains these buttons:

- Spell Check
- Launch 360-Degree View
- Send Notification
- Send Email
- Time Entry
- Return to Search
- Previous in List
- Next in Search
- Add a New Case
- Find an Existing Case
- Clone Case
- Correspondence Management

Additional Toolbar Buttons for PeopleSoft Support

In addition to the common buttons , the toolbar for PeopleSoft Support contains these additional buttons:

- Upsell Opportunity Alert
- Order Capture
- Map Dashboard
- CTI Dialer

Additional Toolbar Buttons for PeopleSoft HelpDesk

In addition to the common buttons , the toolbar for HelpDesk contains these additional buttons:

- Asset Discovery

Provided the system and data integration has been accomplished, this button launches a third-party asset management application, in the process passing the desired asset information to the application for reporting.

Launch from

- 360-degree view of an employee.
- Case toolbar.

• Remote Control

The Remote Control button launches a third-party "remote control" process that allows 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 in order to resolve a problem.

  You can create Installed Product records for newly identified assets for an employee using this EIP.

See Chapter 8, "Managing Cases," Integrating with Third-Party Asset Management Applications, page 137.

Notifications

The Case toolbar includes two buttons that provide convenient access to case-related communication and worklist tasks.

• Notification—Launches the Send Notification page.

• Email—Launches the Outbound Email page.

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, there will be separate time records 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 currently assigned agent into that row. If your name does not appear as the currently assigned agent, change this 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.

Upsell Opportunities

This functionality is available only in PeopleSoft Support.

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 the Active Analytics Framework. 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 a has a specified priority. If PeopleSoft Enterprise Advisor has been installed, it is used to recommend a product to upsell. If Advisor is not installed, a branch script is used. Branch scripts are associated with specific products. Clicking the button launches either Advisor or a branch script and adds it to the list of Related Actions for the Case.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case Upsell Actions.

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.

Background Processing

This section discusses case processing that is transparent to the end user.

Active Analytics Framework (AAF)

PeopleSoft Active Analytics Framework is a suite of tools comprising a closed-loop decision-making system where specific business issues can be addressed. 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; identification of 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 to true, their associated actions are invoked.

Your organization can set up Active Analytics Framework (AAF) to trigger various actions under specified conditions. Active Analytics Framework (AAF) can perform several actions that are transparent to the person who triggers the action. AAF 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 predetermined time. Typically, the notification informs you of the 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.

Active Analytics Framework (AAF) also triggers actions whose effects are visible in the case where they are triggered:

- Suggest an action.
- Display alert messages and cross-sell and up-sell notifications.
- Recommend a solution, or a product in an up sell or cross-sell.

- 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.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework”.

Capturing 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 forth. The 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 email is sent from a case to an employee, it creates an interaction only if the employee is the customer, contact, or alternate contact for the case.

- You create notifications for a case.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Understanding Active Analytics Framework

Accessing Existing Cases

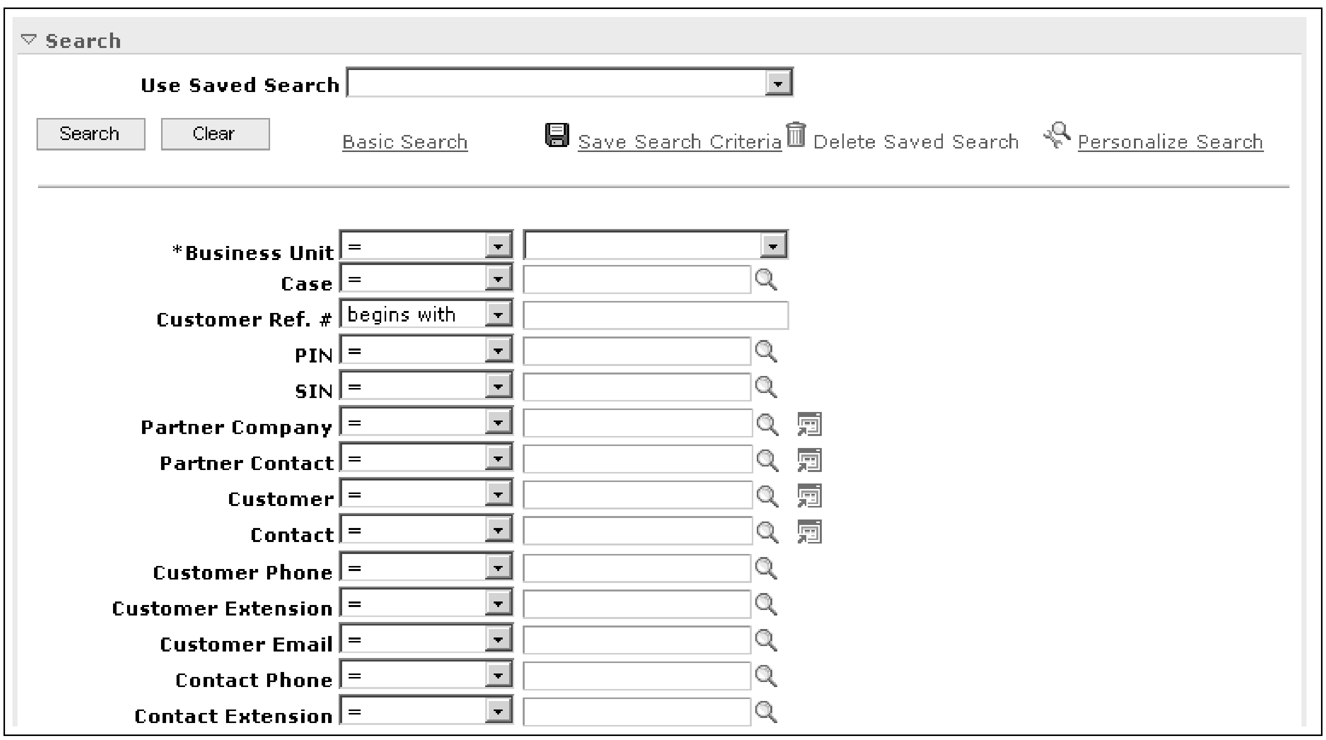
This section discusses how to access existing cases:

Pages Used to Access Existing Cases

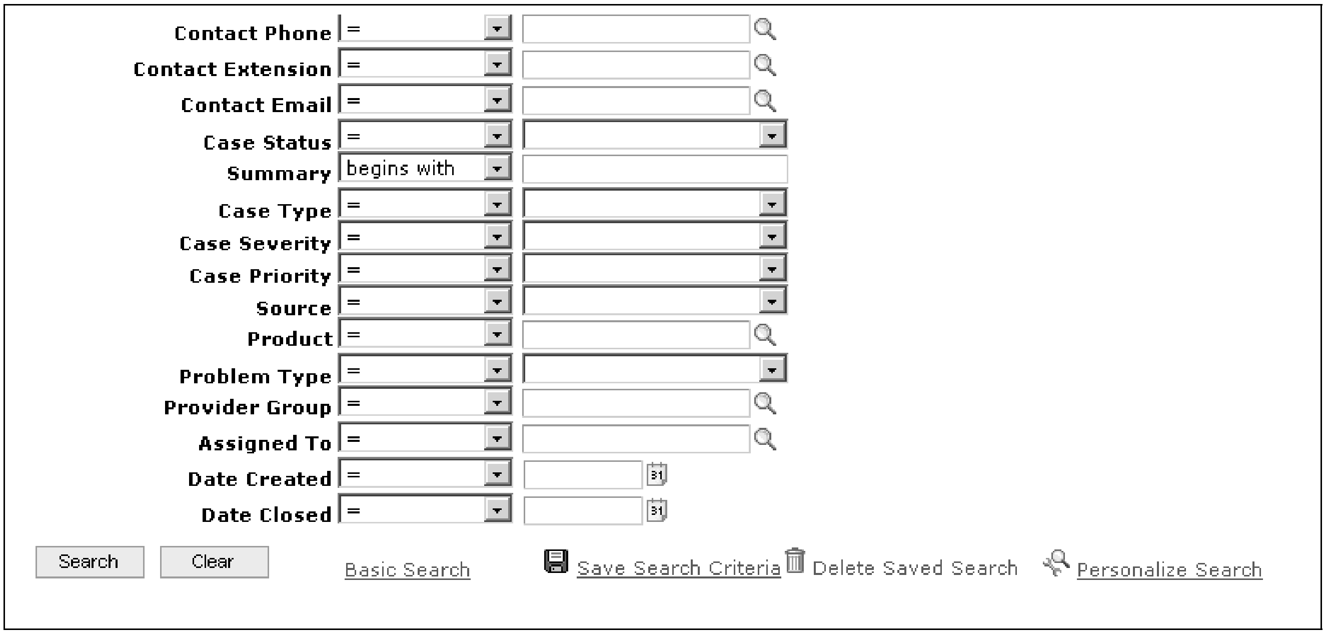
Page Name	Object Name	Navigation	Usage
Case Search	RC_CASE_SEARCH_UPD	• Support, Search Cases • HelpDesk, Search Cases • HR HelpDesk, Search Cases	Access existing cases.
Relate Existing Case - Search page	RC_CASE_SEARCH_SEC	HelpDesk, Search Cases Click the Relate an Existing Case button on the Related Cases page.	Select a case to relate to the current case. The system displays the Relate Existing Case - Search page. **Note.** With the exception of PeopleSoft HelpDesk, this page is delivered hidden. If you want to relate cases to other cases, modify the display template to enable this page.

Accessing Existing Cases

Access the Case Search page.



Case Search page (1 of 2)



Case Search page (2 of 2)

General Information on Searching for Existing Cases

If the case is secured, the message *Secured* appears instead of the problem summary. This message comes from the message catalog, so that you can easily modify the text.

If you are using the Secure Case functionality, you must first establish a person ID on the User Profiles – ID page (select PeopleTools, Security, User Profiles, User Profiles, ID) for each user and then associate the person ID with an employee ID in the Worker component (select Workforce, Worker, Add Worker). The system uses the person ID to determine whether the user is in the provider group assigned to a secure case. If a user does not have a person ID when they try to access a case, the system displays an error message.

Most search criteria fields correspond to fields on the Case page. However, on the Case page, you must enter valid values, whereas on the Case Search page, you can enter part of the whole value in most fields (depending on what operators are set for a given search field).

Note. The information that is available for searching on the Case Search page is conditional, based on the template that you or your implementation team have assigned to the business unit.

There are a few exceptions:

- You must enter a complete value in these fields: Case (case number), Business Unit, and National ID (PeopleSoft HelpDesk for Human Resources only).
- You can enter partial values in the Customer and Contact fields, but only after you click the lookup button associated with the field. The system displays the appropriate lookup page, where you can search for and select a customer or contact before attempting the search again.

Basic and Advanced Searches

You can use basic search to perform searches using the most commonly used search fields. Advanced search provides users with a list of less commonly used search fields in addition to the more commonly used search fields available in basic search.

Users can perform Boolean searches using field-level search criteria. The system administrator defines the operators that appear on the Configurable Search Setup page. Users can further refine the list of operators for each field if they are granted permission to personalize their search settings.

The system displays a list of the searchable fields. For each field, you can enter a search operator and the search text.

This table lists the search operators that are available for field-level searching. The operators that appear depend on whether the field being searched is a string or a number.

Operator	Description
<	The field value is less than the value that you enter.
<=	The field value is less than or equal to the value that you enter.
>	The field value is greater than the value that you enter.
>=	The field value is greater than or equal to the value that you enter.
=	The field value is equal to the value that you enter.
begins with	The field value matches the first characters of the value that you enter.
between	The field value is between the two values that you enter. You must enter two values. For example, suppose that you select *BETWEEN* and enter *100 and 200,* the search returns values from 100 to 200, inclusive.
in	You enter a comma-delimited series of values, and the system finds field values that match any one of the values that you entered.
is blank	The field value that you are asking the system to search is blank.
not	The field value is not equal to the value that you enter.

Note. PeopleSoft does not deliver the contains operator because it may cause performance problems. To add it to the list of available operators, use the Configurable Search Setup page.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages,” Configuring Searches.

Searches

Depending on how your implementation team configures the search pages for your system, you may not be able to view all of these fields.

Note. If you do not see a field for which you want to perform a search on the basic search page, click the Advanced Search link. If the field that you are looking for does not appear, click the Personalize Search link. The system displays the Personalize Search Settings page (if the system administrator has made this page available to you). You can use this page to select additional fields to display on the search page. If you still do not see the field that you are looking for, contact your system administrator.

Use Saved Search Provides access to all saved searches.

Basic Search Click to display a condensed list of fields from which you can search or add new cases. Basic search displays the most commonly used search fields only. These fields include, for example,Company, Contact, Site.

Advanced Search Click to display an expanded list of fields from which you can search or add new cases.

Save Search Criteria Click to save the current search criteria as a saved search (either as a new saved search or as a modification to an existing saved search). Then enter the name of the saved search in the Save Search As field and click Save Search.

Delete Saved Search Click to delete a saved search. Then select the name of the search that you want to delete and click Delete.

Personalize Search Click to configure the search page to your own personal preferences.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Search Pages," Personalizing the Search Page.

Search Criteria Fields for PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources

Business Unit Enter a business unit. Your user preferences determine the default business unit that appears when you open the Case Search page. This field is required when you add new cases and when you search for existing cases. The only exception is that you do not have to enter a business unit if you enter the case ID when searching for an existing case.

Note. To perform a search, the system requires you to enter a business unit and one additional field. If you enter the business unit only, you receive a message instructing you to enter additional search criteria.

When you create a new PeopleSoft Support case, the business unit controls which customers are included in the search domain. Customers are associated with setIDs; you can access those customers in the setID that are associated with the case's business unit only.

When you create a new PeopleSoft HelpDesk and HelpDesk for Human Resources case, the business unit that you specify on the Case Search page does not limit which employees are included in the search domain.

Search Criteria Fields for PeopleSoft Support Only

PIN (personal identification number) Enter a PIN to identify a customer, a representative, and an agreement.

SIN (site identification number) — Enter a SIN to identify a customer, a site, and an agreement.

Customer — Enter a customer name. The system searches against all contacts associated with the customer, even if you provide support under an agreement that specifies named callers. Once you're on the Case page, however, you can access the agreement line and verify whether the contact is allowed to report cases.

Contact — Enter the name of a contact, who acts as a representative for the company, regardless of whether that person is associated with the case in question.

Search Criteria Fields Specific to PeopleSoft HelpDesk and HelpDesk for Human Resources

Name — Enter the name of a worker or employee who is experiencing the problem.

Department, Location, and **Physical Location** — Enter a department, location or physical location in the search, if applicable. The Case search page does not limit values for these fields based on the name or employee ID that you enter.

Search Criteria Field Specific PeopleSoft HelpDesk for Human Resources

National ID — Enter the national ID of an employee. If the employee has both the national ID and social security number (SSN), the system performs a search on the one that is set as primary. On the Case page, the system changes the label to the ID that is set as primary; either National ID or SSN.

Search Commands

Search — Click this button (or press ALT + S) to perform a search. The system searches for all possible matches and displays the results in the Search Results grid.

Clear — Click this button (or press ALT + C) to clear data from the search criteria fields.

Search Results

After you perform a search, the system completes the Search Results grid. Click any entry in the grid to navigate to the Case page. If you're adding a new case, the system enters the caller information on the Case page.

The fields in the results grid correspond to the search criteria fields. The fields that appear depend on your search criteria. For example, if you searched based on phone number or email address, the Search Results grid displays that information.

Create Anonymous Case — Click to create an anonymous case. The system enters *Anonymous* as the Contact Name in the Search Results grid. Click the contact name to add a new case.

Search Strategies

Here are some search tips:

- You can enter partial values in any field except Case, Business Unit, and National ID.

  For example, if you select *begins with* as the operator and then enter *Smi* in the Name field, the search results include a list of all people whose last names start with *Smi*.

- You can enter the least amount of data that is needed to limit the search results.

  Entering extra information is time-consuming and increases the likelihood of a typographical error that prevents the system from finding any information.

  For example, if caller Larry Green provides his name, you can perform a search using that information without asking for his phone number or email address. If there are multiple Larry Greens, you can select one of the Larry Greens from the search results.
- A case number uniquely identifies a case; searching for existing cases by case number displays the Case page (this involves the fewest keystrokes).
- The search is not case-sensitive.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”

Managing Basic Case Information

This section discusses how to:

- Perform toolbar functions.
- Record Customer information.
- Enter product and problem information.
- Verify entitlement (PeopleSoft Support only).
- Assign a case.

Note. The information that is available on the Case page is conditional and is based on the template that you or your implementation team have assigned to the business unit.

Pages Used to Manage Basic Case Information

Page Name	Object Name	Navigation	Usage
Support Case	RC_CASE	• Support, Create a Case, Case • Support, Search Cases, Case	Add and manage PeopleSoft Support cases. Use this page to perform case management tasks such as reviewing identifying information, performing toolbar functions, tracking customer information, entering problem details, verifying customer entitlements, assigning as well as resolving cases.

Page Name	Object Name	Navigation	Usage
HelpDesk Case	RC_CASE	• HelpDesk, Create a Case, Case • HelpDesk, Search Cases, Case	Add and manage PeopleSoft HelpDesk cases. Use this page to perform case management tasks such as reviewing identifying information, performing toolbar functions, tracking employee information, entering problem details, assigning as well as resolving cases.
PeopleSoft HelpDesk for Human Resources Case	RC_CASE	• HR HelpDesk, Create a Case, Case • HR HelpDesk, Create a Case, Case	Add and manage PeopleSoft HelpDesk for Human Resources cases. Use this page to perform case management tasks such as reviewing identifying information, performing toolbar functions, tracking employee information, entering problem details, assigning cases, resolving cases as well as performing and tracking actions taken in the human resources system.
Manage Time	RF_TIME	Click the Time Entry button on the Case page (or any page with the case toolbar). Select Time from the call center application menu. Support, Time, Time Entry	Track time spent working on a case.
Send Notification	RC_ADHOC_EMAIL	or Click the Send Notification button or Set Reminder button on the Case page (or any page with the case toolbar).	Send a manual notification. **Note.** If you have purchased PeopleSoft ERMS, you can use the Outbound Email button on the toolbar. **Note.** If there are no interested parties defined for a case, and you select the Interested Parties check box on the Send Notification page, a warning will appear that states there are no Interested Parties associated with this case.

Page Name	Object Name	Navigation	Usage
Installed Product Viewable Hierarchy	RF_INSTPROD_VH_SEC	Click the View Product Hierarchy button on the Informationsection on the Case page.	View the installed products that meet the criteria available on the Case page. For the installed products that the system returns, the page displays parent, child, and sibling relationships to other installed products.
Entitlement Match	RF_ENTL_LIST_SEC	Select Agreement or Warranty Click the Select Agreement or Warranty button on the Case page.	Select from a list of warranties or agreement lines that may cover the case.
Entitlement Details	RF_VIEW_ENTL_SEC	Click the available warranty or agreement line link on the Case page.	View the entitlements associated with a case. This link is available after an agreement line or a warranty has been selected.
Provider Group Summary	RF_ASSIGN_PG_SEC	Click the Suggest a Provider Group button on the Case page.	Select a provider group from the search result that can be assigned to the case. Groups are ranked by their fit score, an evaluation of how well each group matched the criteria on the case.
Candidate Summary	RF_ASSIGN_LIST_SEC	Click the Suggest an Agent button on the Case page.	Select a worker from the search result that can be assigned to the case. Candidates are ranked by their fit score, an evaluation of how well each candidate matched the criteria on the case.

Reviewing Identification Information

Access the Case page in PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources.

Performing Toolbar Functions

Access the Case page in PeopleSoft Support, HelpDesk or HelpDesk for Human Resources.

The toolbar at the top of the Case page and all pages in the Case component includes 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 the these page elements:

360	Click the Launch 360-Degree View button to view employee, consumer, or representative details and perform transactions. Employee details appear for PeopleSoft HelpDesk cases only. Consumer or representative details appear for PeopleSoft Support cases only.

The system records interactions and subinteractions in the Interaction Tree on the 360-Degree View page. Interactions also appear on the Case History page.

Click the button to access the Send Notification page, where you can send an email or worklist notification with a text message and a link to the current case. The system prompts you to save the case before you access the Send Notification page.

Note. Notifications are also tracked as interactions.

Click the Email button to access the Outbound Email page, in which you can generate a response to the case, forward its details to other recipients, or access the worklist.

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 the case has been saved for the first time.

Click the Return to Search button to access the Case Search page in Update an Existing Case mode.

 and 

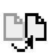
Click the Previous in List and Next in List buttons to navigate to the next or previous case that appears in your search results on the Case Search page.

Click the Add a New Case button to access the Case Search page in Add a New Case mode.

Click the Update a Case button to access the Case Search page in Find an Existing Case mode.

Note. The Configurable Search Setup pages determine what result set (if any) appears when you click the Update Case button.

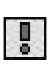
See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages,” Configuring Searches.



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 *not* 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 populates the customer and product data on the Entry Form page automatically.



Click the Upsell button to run the upsell script. It appears only if an upsell script is associated with the product and if other business unit-specific upsell criteria are met.

The upsell functionality is specific to PeopleSoft Support.

Click the Create Correspondence button to access the Create Correspondence page and draft emails and add attachments to your correspondence.

History

Select a value and click the green arrow to return to the selected page. It appears if you access the Case page through another page besides the Case Search page.

Current user time

Displays the time that you opened the component. This field is informational only; it is not saved with the case.

Time zone

Select the time zone in which to display the times on the page. Values are:

My Time Zone: The current user's local time zone.

Customer (PeopleSoft Support only): The time zone that is associated with the caller.

Employee (PeopleSoft HelpDesk and HelpDesk for Human Resources only): The time zone that is associated with the caller.

Assigned: The time zone of the agent who is currently assigned to the case.

Previously Assigned: The time zone of the agent who was previously assigned to the case.

See Also

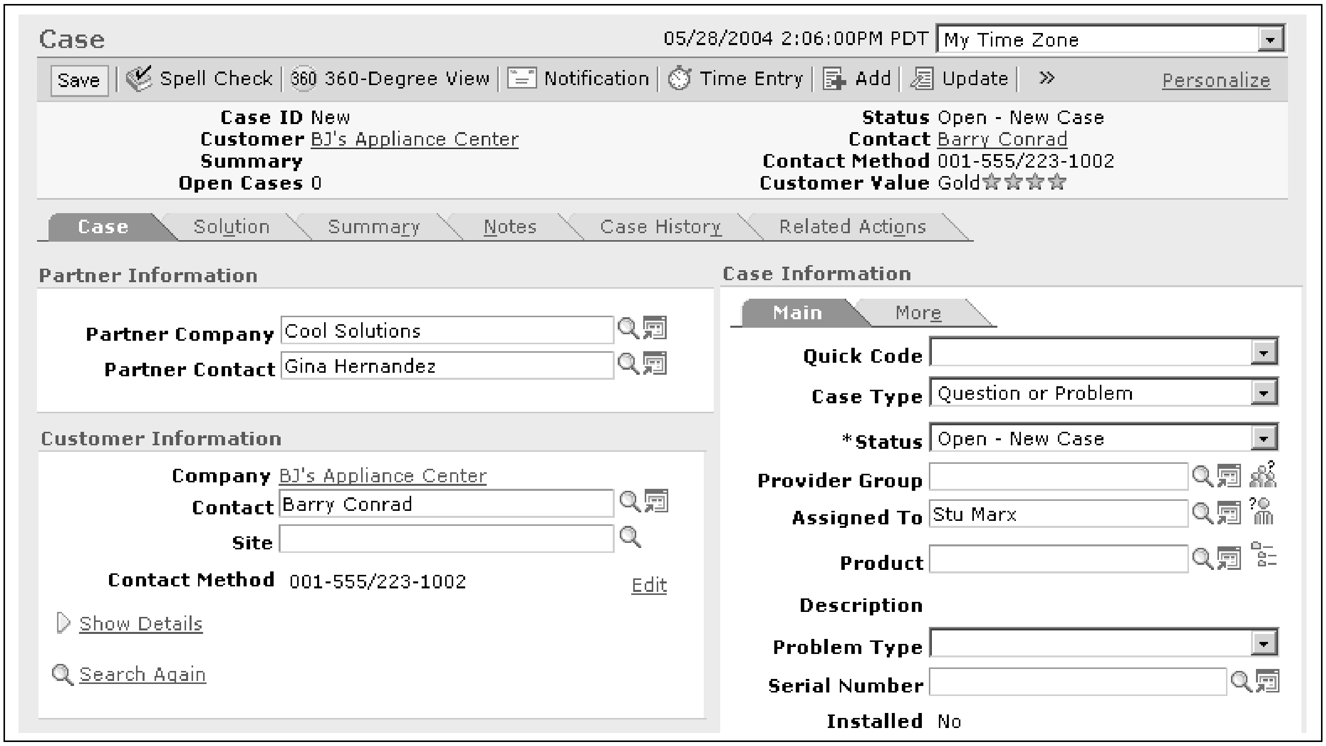
Chapter 9, "Processing Cases," Reviewing Case History, page 144

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Sending Manual Notifications"

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Configuring Toolbars"

Recording Partner Information

Access the Partner section on the Case page. Depending on the display template, this section may be hidden. Modify the display template if you want the Partner Information section visible on the Case page. If you have purchased PeopleSoft Enterprise PRM for Service, the display template contains partner section and field options, which are delivered disabled. There are two display layout options: on the Case Information section or as its own "Partner" section on the case page. There is no benefit to using both layout options.



Partner Information section on the Case page

Partner Company Displays the partnerwho is related to the case.

Partner Contact Displays the contact person for this case.

Note. The contact must have a currently active relationship with the company to be valid.

See *PeopleSoft Enterprise Partner Relationship Management 8.9 PeopleBook.*

Recording Customer Information

Access the Customer/Employee section on the Case page in PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources.

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 box displays employee information.

Select the Show Details hyperlink to see more information on the customer.

Customer Information (Show Details) section on the Case page

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.

Note. These fields are specific to PeopleSoft Support.

Customer Displays the customer (company or consumer) who reported the case.

Contact Displays the contact person for this case. If the customer is a company, this is a person acting on the company's behalf. If the customer is a consumer, this is someone acting on the consumer's behalf.

> **Note.** The contact must have a currently active relationship with the company to be valid.

If a consumer does not have a contact, this field is blank on the Case page. (However, the search results grid on the Case Search page shows the consumer name in both the customer and contact columns).

Customer Reference Enter the reference number provided by the customer, if available. This number is used for the customer's internal tracking purposes.

SIN Displays the site identification number, 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.

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.

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.
Region	Displays the region that is associated with the default address.

Employee Information

In PeopleSoft HelpDesk cases, the Employee Information group box displays information about the employee who reported the problem. Because you've already identified the employee before you ever get to the Case page, the system collapses this region when you first open the page. To view employee information, expand the region.

Note. The visibility of fields in this section is dependent on the display template that is used and how you modify the display template.

Note. These fields are specific to PeopleSoft HelpDesk and HelpDesk for Human Resources.

Name	Displays the worker who is experiencing the problem.
National ID	Displays the person's ID by which they are identified nationally. In the United States it is the social security number. This field appears in PeopleSoft HelpDesk for Human Resources cases only.
Gender	Displays the person's gender if known. This field appears in PeopleSoft HelpDesk for Human Resources cases only.
Department, Location, and **Physical Location**	Displays information about the worker who is experiencing the problem.
Alternate Contact	Enter an alternate contact for a case, for example, an office manager who handles calls for other employees.

Contact Method

Select the Edit hyperlink to edit a contact's contact method. A secondary page appears.

Phone Type, Phone, Email Type, and **Email**	Select the phone type and email type for the contact, for example, *business* or *home*. Based on the selected phone and email types, the system displays the associated phone number and email address that can be used to get in touch with the contact.
Contact Method	Select the preferred method for contacting the caller. Values are *Phone* and *Email*.
Contact Details	Enter additional contact information in this field if the contact method involves a phone number or an email address that is not in the system. For example, suppose that you need to contact the caller at a hotel phone number, you can enter the phone number here and thus avoid having to add the hotel phone number to the caller's permanent record. To add a phone number or email address to the caller's permanent record, click the Transfer button next to the caller's name and update the caller's record as required.

Additional Fields in the Customer Section

Depending on the display template, these fields may or may not be enabled. The Billing and Account fields are available only for the PeopleSoft CRM solutions Contact Center for Insurance, Contact Center for Communications, Contact Center for Energy, and Contact Center for Banking.

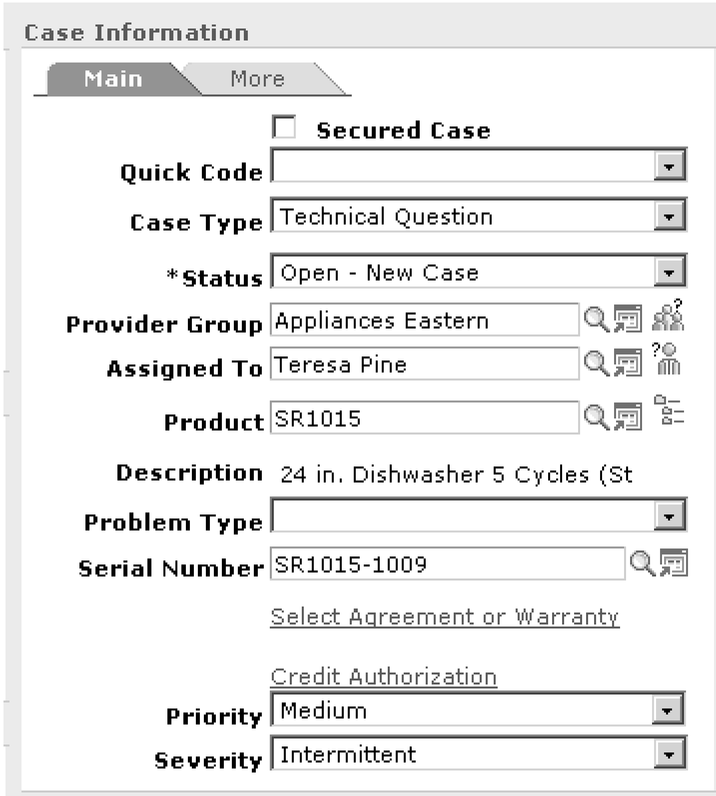
Alternate Contact	Select an alternate contact. This option applies to HelpDesk and HR Helpdesk.
Billing Account	Enter the billing account number.
Account Name	Enter the billing account name.
Account Number	Enter the financial account number.
Account Type	Enter the financial account type.
Contact Details	Enter additional contact information in this field if the contact method involves a phone number or an email address that is not in the system. For example, suppose that you need to contact the caller at a hotel phone number, you can enter the phone number here and thus avoid having to add the hotel phone number to the caller's permanent record. To add a phone number or email address to the caller's permanent record, click the Transfer button next to the caller's name and update the caller's record as required.

See Also

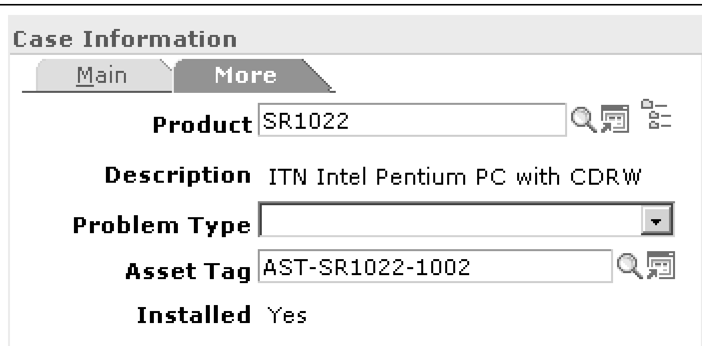
Chapter 8, "Managing Cases," Case Creation, page 99

Entering Case Information

Access the Case Information section on the Case page in PeopleSoft Support, HelpDesk and HelpDesk for Human Resources.



Case Information section, Main tab



Case Information section, More tab

This section contains the Case attribute fields. The fields on the Case Information section are grouped using "Embedded Tabs" Section layout—the Main and More tabs. Use the display template to control which fields are displayed on which tabs. Also, display templates to control the visibility of fields within the section.

Enter information about the case in the following fields.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

See Chapter 8, "Managing Cases," Assigning a Case, page 133.

Quick Code Select a quick code. Depending on your business rules, the quick code you select automatically populates other fields or suggests an action.

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 type selected for Case Type.

Case Status
Select the overall status of the case. Use the different statuses to track the progression of the case. Specific statuses are defined by your organization.

Product
Select the product that requires support.

In PeopleSoft HelpDesk, this field prompts against all valid products for the business unit, not just those that are registered to the employee on the Installed Products page. In PeopleSoft Support, this field prompts against the products that are registered to the customer on the Installed Products page.

Selecting a product identifies the product description, and the serial number. When you select an installed product, the system enters the associated site in the Site field, and if the current SIN is not valid for the product, clears the SIN field.

To define a new installed product for this customer, click the Transfer button to access the Installed Products component.

Description
Enter a complete description of the problem that the caller is reporting. If you do not enter a description, the system copies the value of the Summary field into this field.

Problem Type
Select an aspect of the product for which a call center agent might be qualified to resolve the problem. This field is related to the Product field. You must first select a product before the system displays problem type values that you can select. If the Product field is blank, no values are available. If you use the system’s auto-assignment feature, the assignment engine employs the competencies associated with the problem type to help identify the agents who are most qualified to solve the problem.

Serial Number
Enter the serial number of the product that requires support in PeopleSoft Support. If you have selected a product, the system enters the serial number for that product. If you haven’t selected a product, selecting a serial number enters both the product and the serial number.

Installed
Displays as selected in PeopleSoft Support and HelpDesk, if the product that you select is registered to the employee, consumer, or customer on the Installed Products page.

Select Agreement or Warranty
Click to search for warranties and agreement lines that might cover the case. This link is available for open cases only.

Warranties are associated with products and are therefore found only in the Support application and then only if you’ve specified a product.

If the entitlement search returns more than one match, and if the system displays the results on the Entitlement Match page, where you can select a warranty or agreement line, view warranty or agreement line details, and associate a warranty or agreement line with the case.

The system returns agreement lines as search results in entitlement searches for either a product or an installed product. The search attempts to locate either a product or an installed product on the agreement line that matches the product or installed product on the case.

A warranty is returned in an entitlement search only if an installed product is supplied.

If the entitlement search finds only one valid warranty or agreement line, the system bypasses the Entitlement Match page and displays the Detail page for the warranty or agreement line that was found.

Once you've associated an agreement line with the case and saved the case, the Search Entitlement button is no longer visible on the Support application Case page, and the Customer, Contact, Business Unit, PIN, SIN, Site, Product, Serial Number, and Problem Type fields can no longer be modified.

In the HelpDesk Case page, Business Unit, Employee, Product, and Asset Tag can no longer be modified.

Note. Once the page is saved, you can't modify an agreement line without special administrative-level permission.

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.

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 any customer, site, product, and serial number that have been entered.

In PeopleSoft HelpDesk cases, the search is based on any worker, department, product, and asset tag that have been entered.

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 (support or helpdesk) has been established. The system confirms that the 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 the following record groups: FS_18 (items), RB_01 (customers), RF_07 (agreements and warranties), and RC_02 through RC_09 (case attributes and AAF).

Visibility Select the visibility of the case. The options are *Internal* and *External*.

Resolved by First Contact Select to indicate that the agent resolved the case on the first contact with the customer or employee.

Source Select the communication channel used by the person who originally reported the problem. For example, a person can report a case by telephone, email, or a self-service web page.

Impact Select a value from the dropdown that describes the impact that the problem has to business processes.

Asset Tag Enter the asset tag of the installed product that requires support in PeopleSoft HelpDesk. If you have entered a product, values are limited to asset tags for the specified product. If you haven't entered a product, selecting an asset tag enters both the product and the asset tag.

Installed Displays yes or no in PeopleSoft Support and HelpDesk, if the product that you select is registered to the employee, consumer, or customer on the Installed Products page.

Summary Enter a summary of the problem that the caller is reporting. This field is required. If you do not enter a value, the system uses the first 80 characters of the Description field as the summary. This shortcut helps you to avoid retyping the same text into two fields.

Category, Specialty Type, and **Details** Select category, specialty type and details for the case. These are hierarchical fields: the category value that you enter limits the specialty type values, and the specialty type value that you enter limits the details values.

Note. These fields can be set up to drive the case assignment process.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* “Configuring Toolbars”.

See Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Case Specialty Types and Details Within Each Category, page 40.

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 or More sub-page.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* “Configuring Display Templates,” Configuring Display Templates for Components.

Secured Case Select to indicate to the system that the case should only be viewed by individuals associated with the provider group on the case.

When you mark a case as secured, you must enter a provider group before you can save the case. Once you secure the case, it is associated with the provider group.

Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, the agent will not have access to the secured case.

Anonymous Caller Select if the caller wants to remain anonymous. No personal information is recorded, and no personal information is required to save the case.

If the caller wants to register, uncheck the Anonymous checkbox and search for existing customers or use the Quick Create function to create a new customer.

Note. The Anonymous Caller option requires that an anonymous customer or worker is already set up using the installation options.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Using Business Object Search and Quick Create Functionality," Creating Business Objects by Using the Quick Create Component.

Site without Customer Select to enable cases to be created for specific sites without a customer. This check box is displayed after the Customer Information is selected. If you plan to use this option, first set up an anonymous customer, since the system assigns the anonymous customer when this option is selected.

Note that in the Peoplesoft CRM Energy call center solution, the Customer Search returns Companies, Persons, and Sites. In this example, you can search for Sites and determine if a customer is applicable on the case. For other call center solutions, the Customer Search returns Companies and Persons. This is configurable via BO Search setup. Also note that the Peoplesoft CRM Energy solution allows you create a site without associating a customer. Other solutions require a customer when creating a site.

Remote Case/Issue ID The unique key(s) of the case in the third-party system from which the case was passed to PeopleSoft Enterprise Call Center. This option is used to map the case created in CRM with 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 date desired for the resolution of the problem.

Error Code and **Error Message** Error codes are relevant for business units that support products that can display error messages, products such as software or electronics. If you enable error code processing, users can access a list of frequently used solutions based on the error code or error message entered for the case. Enter any error code and error message that the caller reports.

To fill in the message associated with the error code, click the Validate button. If the error code has not been used before, the system displays the Error Validation page. You can then use this page to search for or create new error codes and messages.

By entering error information, you enable the Frequently Used Solutions page to list frequently used solutions according to error. The system does not restrict you from prompting against known errors.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," page 29

Chapter 8, "Managing Cases," Validating Errors Reported by Callers, page 135

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, "Tracking Installed Products"

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Using Business Projects"

Assigning a Case

Access the Case page in PeopleSoft Support, HelpDesk and HelpDesk for Human Resources.

You can:

- Assign cases to either provider groups or agents.
- Assign cases manually.
- Ask the system to suggest assignees.
- Allow the system to assign the case automatically based on your business unit definition.

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.

Click the Suggest a Provider Group button to generate a list of suggested provider groups on the Provider Group Summary page. Select one of the suggested provider groups.

Assigned To

Select an agent who belongs to the selected provider group. For new cases, the default assignee depends on your business unit configuration.

You cannot select an agent without first selecting a provider group. The only time that a case is assigned to an agent and not a provider group is when the default assignee is the agent who created the case.

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.

See Also

Chapter 2, “Defining Call Center Business Units and Display Template Options,” Defining Business Rules for a Call Center Business Unit, page 15

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up and Performing Assignment Searches”

Related Actions Section

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 link to Related Actions like creating a Service Order or a Defect. In Helpdesk for Human Resources, you can link to pages in the Human Resources database.

PeopleSoft Support and HelpDesk applications offer the capability to link to pre-defined actions from the case page. You can execute actions on the Actions section on the Case Page, the Summary page, or the on the Related Actions page.

See Chapter 9, “Processing Cases,” Managing Related Actions, page 155.

PeopleSoft delivers a number of pre-defined actions.

- Creating a Branch Script
- Creating an RMA
- Create Workflow

- Defect – Creat New
- Defect – Relate
- Sales Lead
- Sales Order
- Service Order
- Asset Discovery
- Change Request
- Remote Control

Suggest Action

Displays a suggested action that the agent can perform. The system automatically suggests the Action, which is driven by policies set up in AAF.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework,” Configuring Case Suggested Actions.

Links

Displays the category name (for example, *HRMS, Benefits,* Related Actions), specific links in that category, and a Go button.

Depending on the security established for the links that are set up as CREFs, an agent can view all links or a subset of the links. If the user does not have access to any links in a category, the category does not appear.

Go

Click the button after selecting a link in a category to access the corresponding component (specified as 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. PeopleSoft includes links to Base Benefits and Benefits Administration enrollment functionality in PeopleSoft Human Resources (PeopleSoft HRMS). Enrollment in medical and FSA (flexible spending accounts) plans under the COBRA (Consolidated Omnibus Budget Reconciliation Act) provisions is carried out in a different manner within PeopleSoft HRMS. To access the enrollment pages for medical and FSA plans under COBRA, log on directly to your PeopleSoft HRMS system.

See *PeopleSoft Human Resources PeopleBook*

See *PeopleSoft Benefits Administration PeopleBook*

Status

Each link action corresponds to a row in this group box.

Every time an agent accesses a link, the link usage count is increased by one. The usage count is visible as a read-only field on the Link Definition page. You can use this field for reporting purposes to find out how often a particular link action is taken.

Note. The availability of a link is specified on the Security page for the content reference. It is your responsibility to set up security that matches the security for the target page. If there is a mismatch, an error appears when you attempt to access the page.

See Also

Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” page 53

Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” Setting Up Content References, page 69

Validating Errors Reported by Callers

These links are delivered hidden. If you want to validate errors reported by callers, modify the display template to enable these links.

This section provides an overview of error validation and discusses how to validate errors.

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. After you enter an error code and move your cursor to another field, the Validate link appears next to the Error Code field.

When you enter an error code, the system goes through the following process to ensure that there is a corresponding entry in the Error table:

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, suppose that the case does not specify the error code, but has a message that is an exact match for a known message, the system considers the match an unambiguous match. However, an error code by itself 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 link to access the Error Validation page.

   From this page, you can:

   • Search for similar errors.

     If you find and select an error, the system associates the case with that error. The search is a Verity-based keyword search, so it does not require an exact match—a close match suffices. This 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.

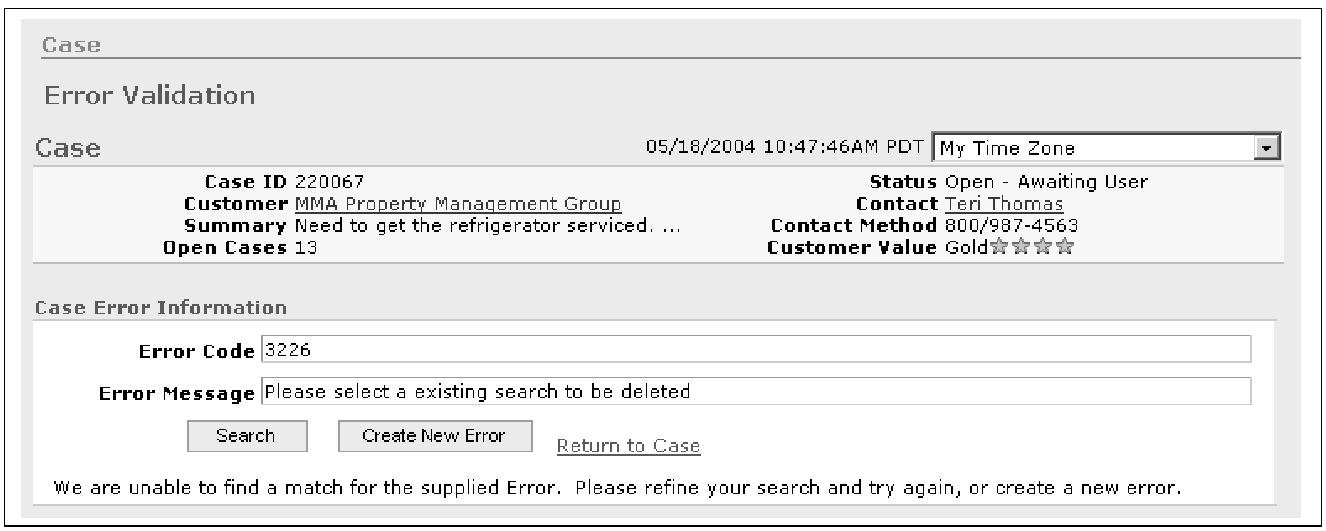
     This process facilitates the process of adding error records to the database. Error records are established as the errors are reported, and you can avoid the up-front effort of creating records for all possible errors.

Page Used to Validate Errors

Page Name	Object Name	Navigation	Usage
Error Validation	RC_CASE_ERROR	Click the Validate button in the Case Information group box on the Case page.	Search for existing errors or create a new error. Use this page when an error on a case does not have an unambiguous match in the error table. The error code elements are visible only if you have enabled the error code tracking for the business unit with which you are working. See Chapter 8, "Managing Cases," Entering Case Information, page 127.

Validating an Error

Access the Error Validation page.



Error Validation page

Error Code and **Error Message** Displays the error code and error message that are prepopulated using the data from the Case page.

Search Click to search for existing errors.

Create New Error Click to create a new error record using the error code and message on the Error Validation page. If you have changed the information on this page, the error code and message on the Case page are updated 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 link 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 area. The are two toolbar buttons—one for Asset Discovery and one for Remote Control. These 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 passed is typically person or asset IDs, such as employee ID number, or the asset tag. The Asset Management toolbar buttions are displayed only when the Asset Management Integration check box is checked; they are hidden if unchecked.

A Case/Event History entry is created to capture the date and time that the asset management application is launched.

To set up case information transfer:

- Set up the link in the Link Definition page.
- Modify the content reference and point it at the Asset Management application installed at your site.

CHAPTER 9

Processing Cases

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

- Search for solutions.
- View the Case Summary page.
- Add notes and attachments.
- Manage related cases
- Manage related actions.
- Manage interested parties.
- Record billing information.
- Manage attributes.

Understanding Processing a Case

In addition to covering problem identification and resolution, this chapter discusses other case management activities that you perform in the Case component on pages other than the Case page.

Note. Pages that are present in both PeopleSoft Support and PeopleSoft HelpDesk are illustrated only once. Screen shots that show customer and contact fields are from PeopleSoft Support. Screen shots that show employee fields are from PeopleSoft HelpDesk cases.

Searching for Solutions

PeopleSoft Customer Relationship Management (CRM) call center, ERMS, 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.

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.

See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook*, "Using Solutions," Finding and Attempting Solutions.

Viewing the Case Summary Page

The Case Summary page allows users to see all the case information nd case activity on a single page.

Modify the display template to control what information and sections you want visible on this page. The Case Summary page could consist of these sections:

- Problem
- Information
- Notes Summary
- Attempted Solutions
- Related Actions
- Related Cases
- Interested Parties
- Case History
- Billing Summary

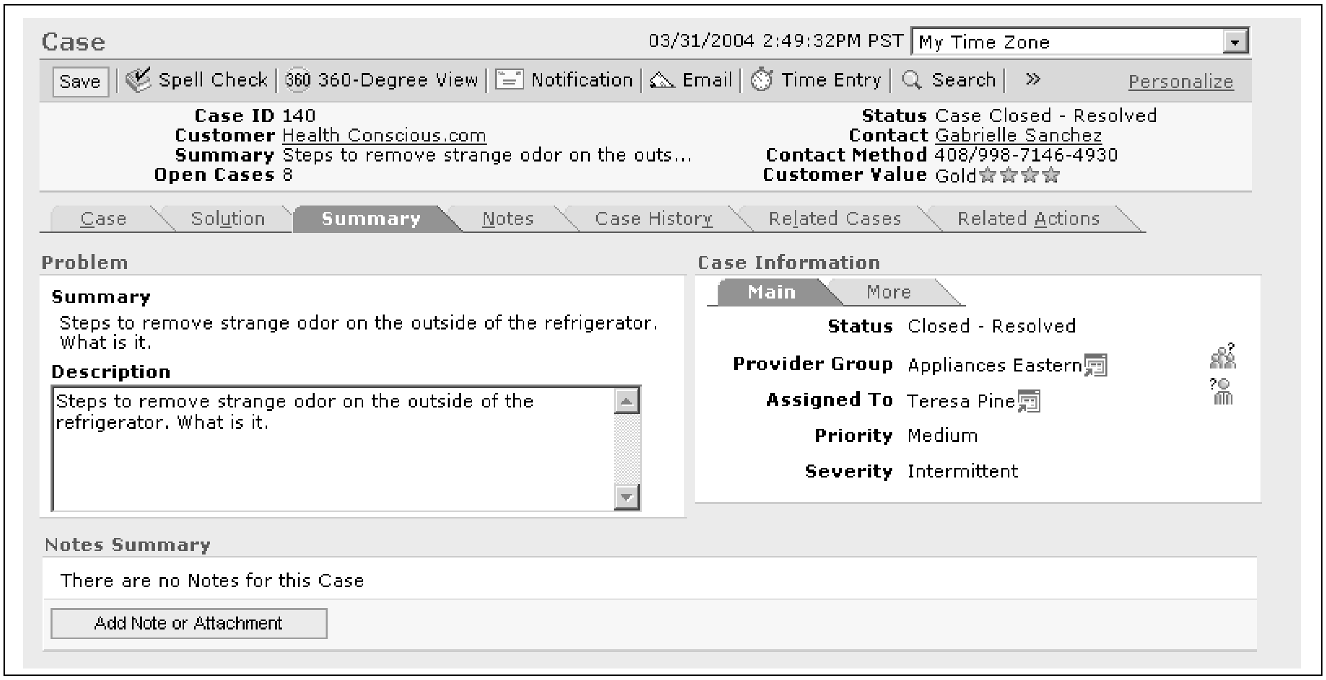
See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates,” Configuring Display Templates for Components.

Page Used to View the Case Summary page

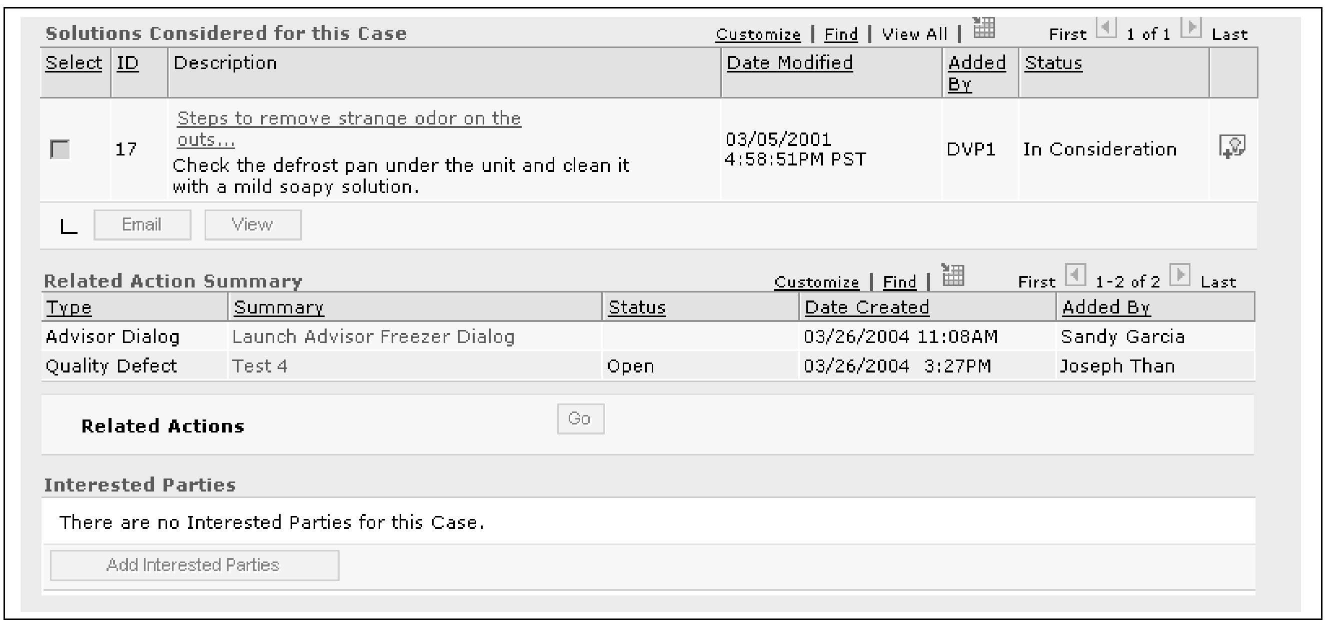
Page Name	Object Name	Navigation	Usage
Summary	RC_CASE_SUMMARY	• Support, Search Cases, Summary You can use the display template to configure your system so that when you access an existing case, you default to the Summary page. • HelpDesk, Search Cases, Summary You can use the display template to configure your system so that when you access an existing case, you default to the Summary page. • HR HelpDesk, Search Cases, Summary You can use the display template to configure your system so that when you access an existing case, you default to the Summary page.	View all the case information on a single page. See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates,” Configuring Display Templates for Components.

Viewing the Summary Page

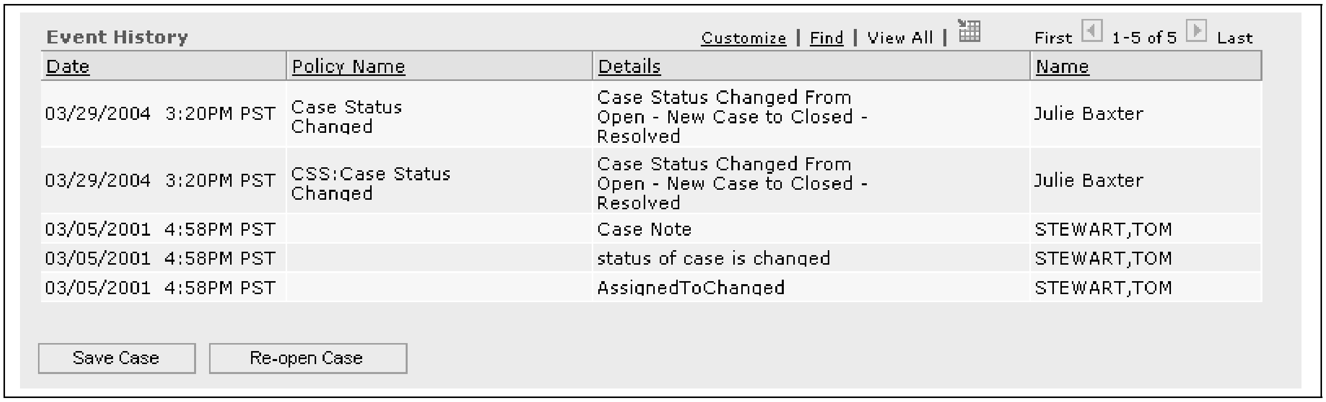
Access the Summary page.



Summary page (1 of 3)



Summary (2 of 3)



Event History — Customize | Find | View All | First 1-5 of 5 Last

Date	Policy Name	Details	Name
03/29/2004 3:20PM PST	Case Status Changed	Case Status Changed From Open - New Case to Closed - Resolved	Julie Baxter
03/29/2004 3:20PM PST	CSS:Case Status Changed	Case Status Changed From Open - New Case to Closed - Resolved	Julie Baxter
03/05/2001 4:58PM PST		Case Note	STEWART,TOM
03/05/2001 4:58PM PST		status of case is changed	STEWART,TOM
03/05/2001 4:58PM PST		AssignedToChanged	STEWART,TOM

Save Case | Re-open Case

Summary (3 of 3)

Adding Notes and Attachments

This section discusses how to add notes and attachments to a case.

Recording notes and attaching files to those notes is often essential to your work. Notes are the primary method that you will use to track your 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.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments," Understanding Notes and Attachments.

Note. Once a case is closed, you can only add a note by using the Notes page's Add a Note section—you cannot enter a note on the Main page in the Add Notes section.

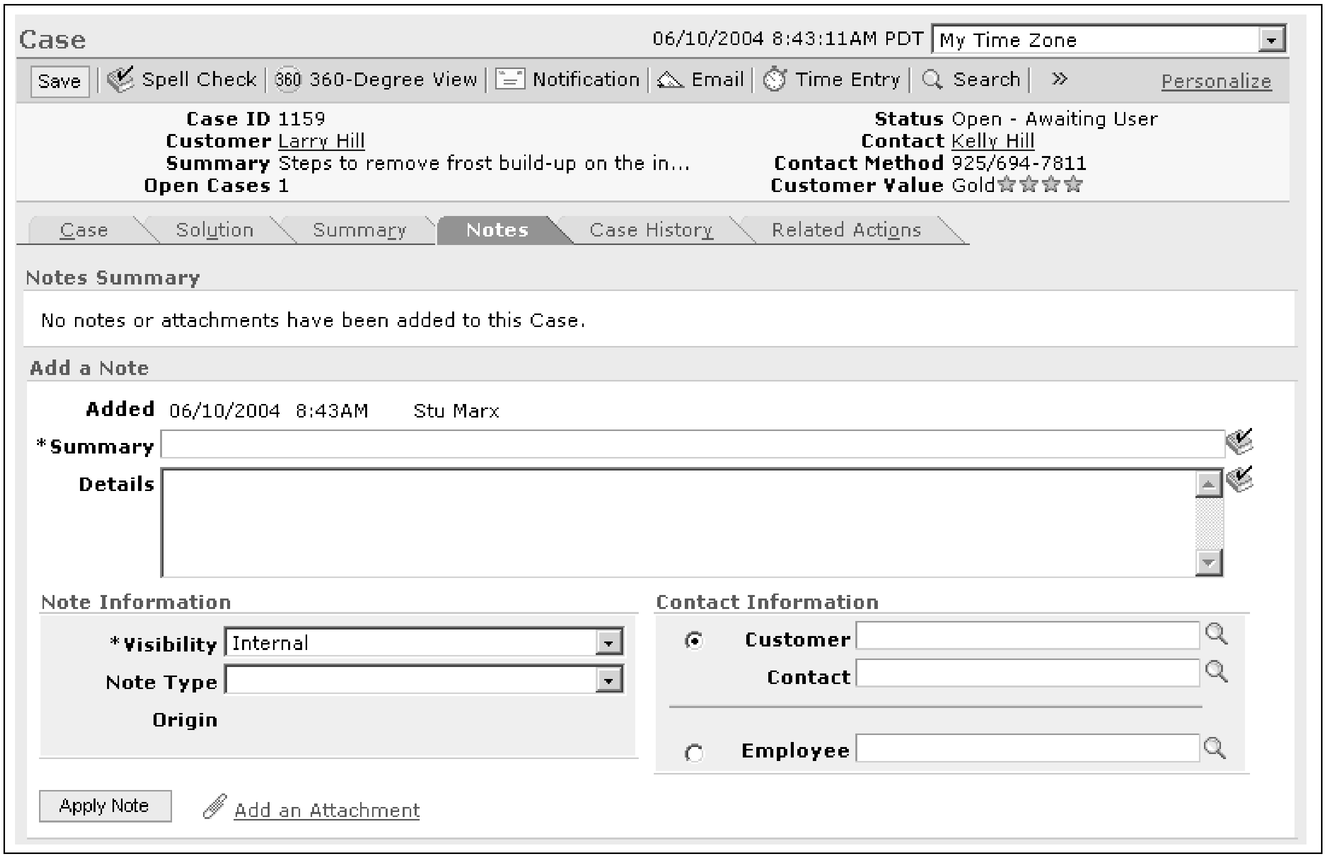
Note. This page is delivered enabled. Notes can also be added on the Summary page.

Pages Used to Add Notes and Attachments

Page Name	Object Name	Navigation	Usage
Notes	RC_CASE_NOTE	• Support, Search Cases, Notes • HelpDesk, Search Cases, Notes • HR HelpDesk , Search Cases, Notes	Track notes and attachments that are related to cases.

Adding Notes and Attachments

Access the Notes page.



Notes page

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

Reviewing Case History

This section provides an overview of case history and explains how to:

- View the event history of a case.
- View interactions for a case.
- View the audit trail for a case.

Understanding Case History

The Case History page includes three subtabs: a Event History page, an Interactions page, and an Audit History page:

- Event history provides a summary of the major events in the life cycle of a case.

  See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case History Actions.

- Case interactions are the sum of the events that take place when a customer or worker contacts the organization.

- Case auditing complements event history processing by providing an automated mechanism for keeping a detailed change history without cluttering up the Event History page. Events to be logged are configurable.

Some overlap is acceptable in the data that these pages capture.

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 determines the events that are logged. In addition, each item references the policy name of the AAF policy containing the case history action that logged the item. Policies are not active until you set them up.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case History Actions.

The following mechanisms insert data into the case history table:

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/accessed via CTI, from the 360-degree view, or in Self-Service. An interaction is also created when notifications, email, and correspondence are sent. Interactions are logged automatically, there is no way to turn them on and off. An interaction may contain multiple subinteractions.

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). 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. Auditing is delivered disabled.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up Auditing for Cases and Inbound Email"

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Interactions"

Pages Used to Review Case History

Page Name	Object Name	Navigation	Usage
Event History	RC_ACTION_HIST	• Support, Search Cases, Case History • HelpDesk, Search Cases, Case History • HR HelpDesk, Search Cases, Case History	View a summary of important events in the life cycle of a case.
Interactions	RC_ACTION_HIST	Click the Interactions tab on the Case History page.	View information about interactions related to the case.
Audit Trail	RC_ACTION_HIST	Click the Audit tab on the Case History page.	View detailed information about changes to specific fields in the case.

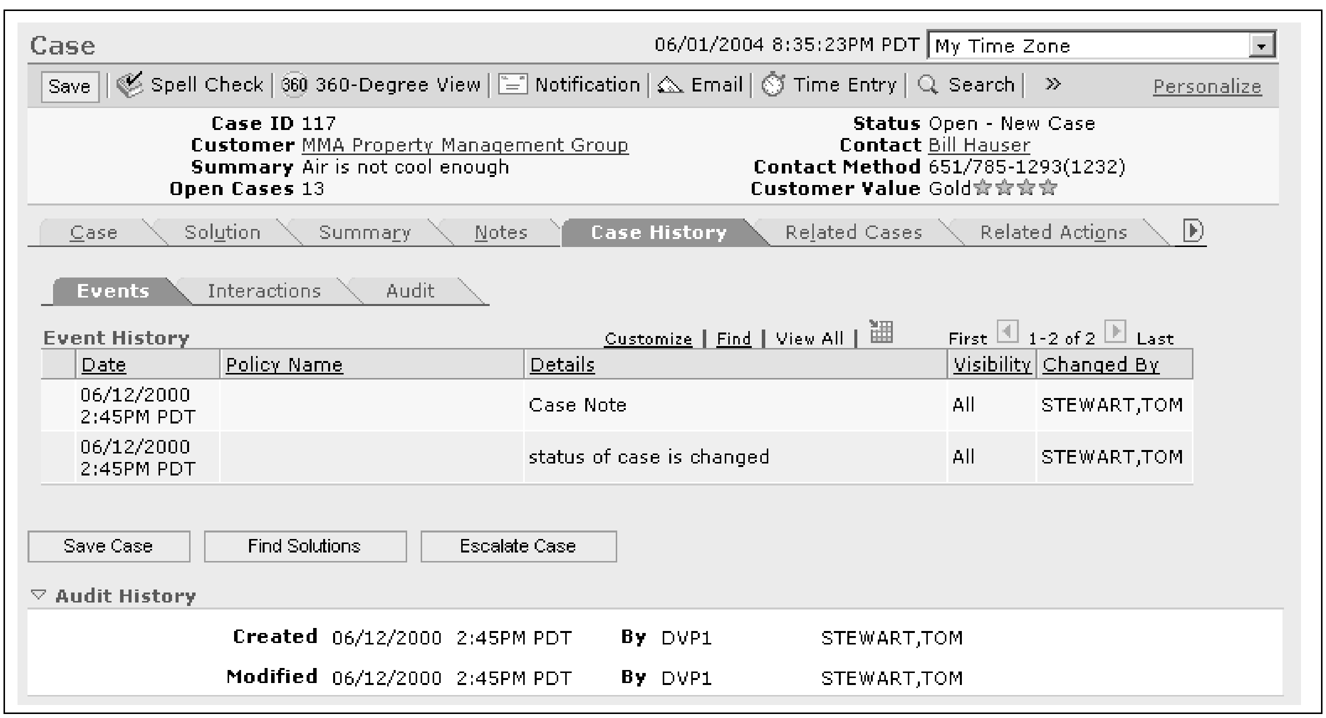
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up Auditing for Cases and Inbound Email”

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Configuring Case History Actions

Viewing the Event History of a Case

Access the Case History page.



Case History – Events page

Interactions Click to display the Interactions page.

Audit Click to display the Event History page.

Date The date that this action occurred.

Policy Name The system populates this field with the description of the action from the Event Definition page.

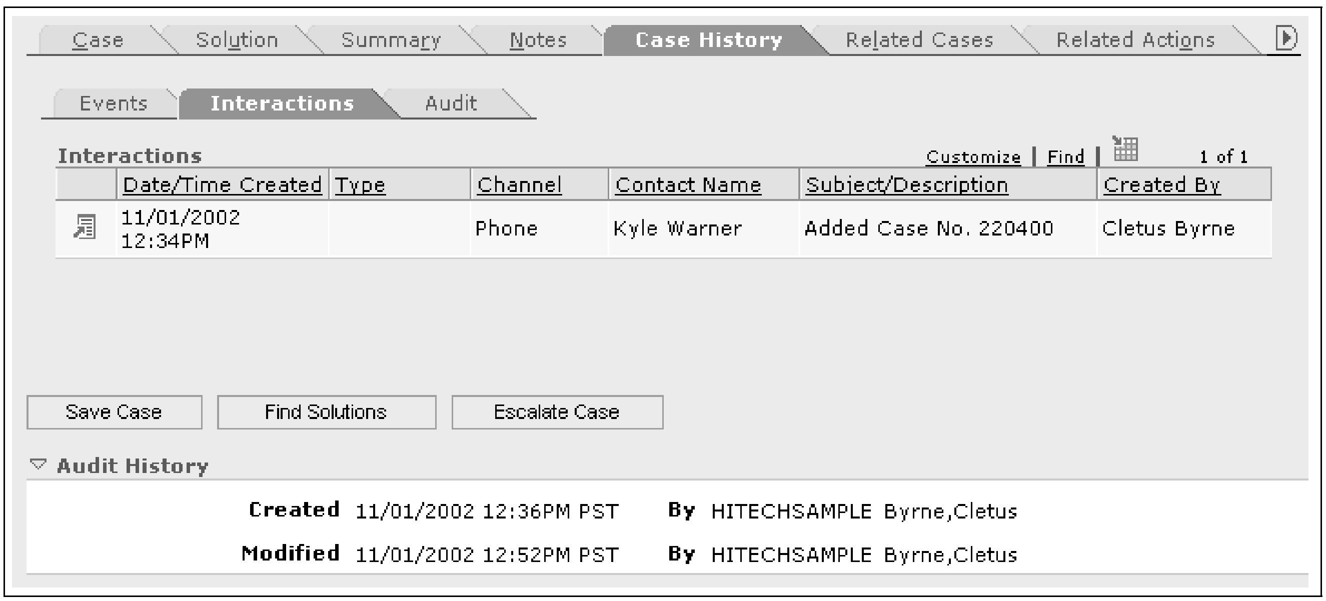
Details Describes the details of the action that was taken. For example, is a case gets escalated or the assignement of a case changes.

Visibility The system displays either *All* or *Internal* to indicate who can view the details of the event.

Changed By The name of the agent who initiated the event.

Viewing Interactions for a Case

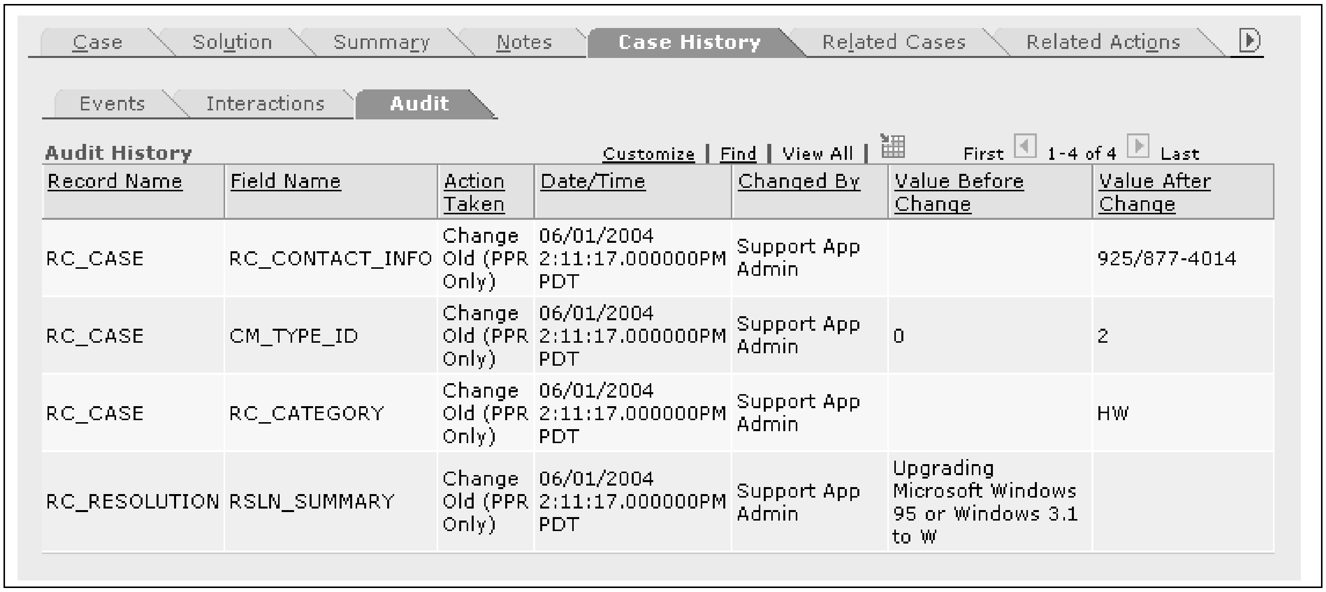
Access the Case History page. Click the Interactions link.



Case History: Interactions page

Viewing the Audit Trail for a Case

Access the Case History page. Click the Audit link.



Record Name	Field Name	Action Taken	Date/Time	Changed By	Value Before Change	Value After Change
RC_CASE	RC_CONTACT_INFO	Change Old (PPR Only)	06/01/2004 2:11:17.000000PM PDT	Support App Admin		925/877-4014
RC_CASE	CM_TYPE_ID	Change Old (PPR Only)	06/01/2004 2:11:17.000000PM PDT	Support App Admin	0	2
RC_CASE	RC_CATEGORY	Change Old (PPR Only)	06/01/2004 2:11:17.000000PM PDT	Support App Admin		HW
RC_RESOLUTION	RSLN_SUMMARY	Change Old (PPR Only)	06/01/2004 2:11:17.000000PM PDT	Support App Admin	Upgrading Microsoft Windows 95 or Windows 3.1 to W	

Case History: Audit page

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, changing , or deleting). However, 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.

Managing Related Cases

This section provides an overview of related cases and discusses how to:

- Review and initiate case relationships.
- Specify relationship details when relating a case to an existing case.
- Specify relationship details when creating a new case.

Note. With the exception of PeopleSoft HelpDesk, this page is delivered hidden. If you want to relate cases to other cases, modify the display template to enable this page.

Note. You can also modify the display template to enable the Related Cases grid on the Case Summary page.

Understanding Related Cases

Cases can be related 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, there is only one valid label.

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 —use the Related Case 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.

Your organization can use the AAF action of Case Relationship 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, if your organization establishes a global relationship type for tracking problems where a single fix (such as rebooting a server) fixes a problem for multiple people, then 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.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Working with Active Analytics Framework," Configuring Case Relationship Actions.

Methods for relating cases are:

- Relate the current case to another existing case.

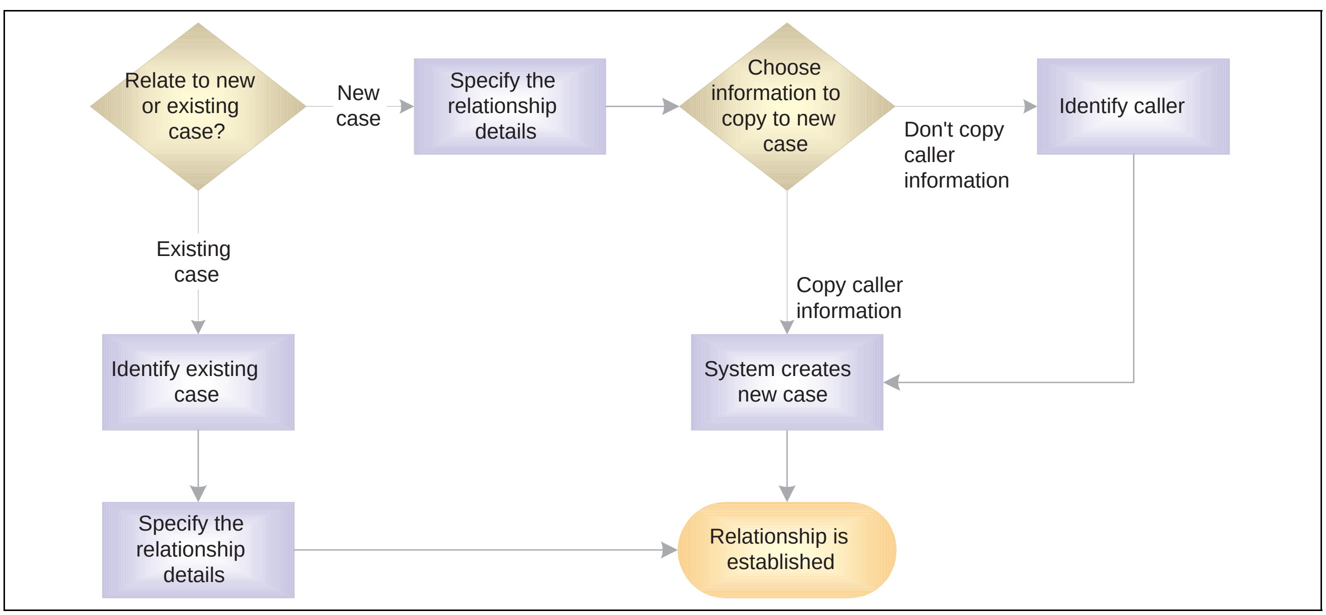
  For example, you receive four calls reporting problems about your Web server before you recognize that this is a global problem. The four cases that you've already created need to be related to each other. When you relate the cases, you can choose one as the parent case and make the other three into 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 the user to relate a case to a new or an existing case on the Case Summary page.

The following diagram illustrates the methods for relating cases:



Methods for relating cases

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.

   TheSearch 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 identify 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.

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, resolution information.

4. Click OK.

   Customer or employee information is required for all cases. Therefore, if you chose *not* to copy caller information, the Create a New Case - Relations page appears so that you can identify the company/contact or 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 chose to copy the caller information, the system immediately creates the new case and returns you to the Related Cases page. The newly established case relationship appears in the Existing Related Cases grid. Select the case link in the Related Cases grid to transfer to the new case.

See Also

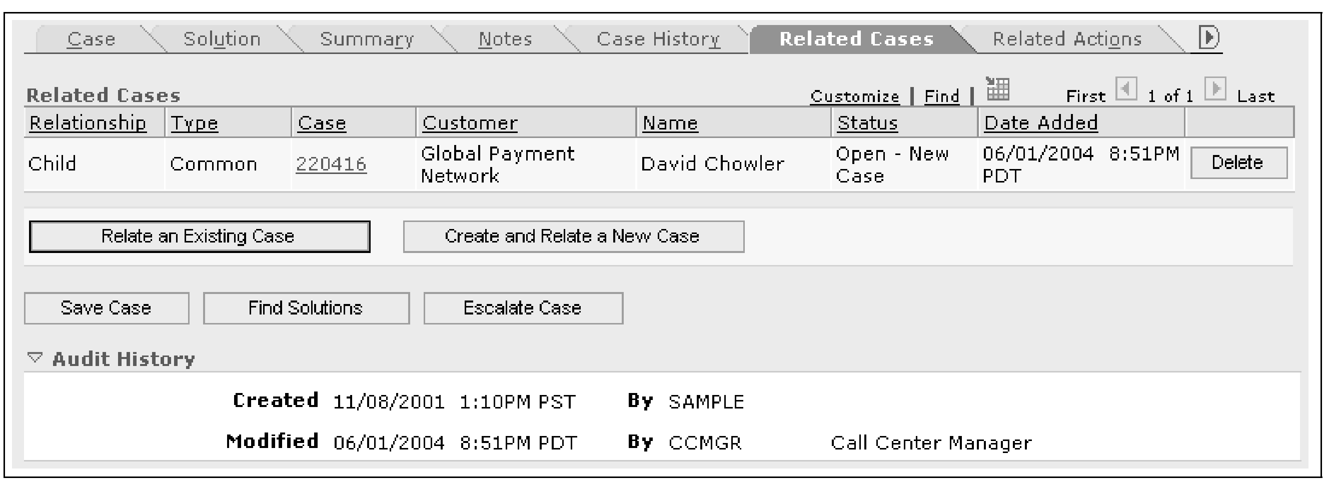
Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Case Relationship Types and Labels, page 45

Pages Used to Manage Case Relationships

Page Name	Object Name	Navigation	Usage
Related Cases	RC_RELATIONSHIP	• HelpDesk, Search Cases, Case, Related Cases • HelpDesk, Create a Case, Case, Related Cases	Manage case relationships: relate cases to each other based on case relationship types that your organization has established; view and delete existing case relationships. Prerequisites: Your organization must define case relationship types and workflow rules for cascading statuses through related cases.
Search Cases page	RC_CASE_SEARCH_REL	Click the Relate an Existing Case button on the Related Cases page.	Select a case to relate to the current case.
Relate Existing Case - Relationship	RC_REL_TYPE_SEC	Select the case on the Relate Existing Case - Search page.	Specify the relationship details when relating a case to an existing case.
Create a New Case - Relationship	RC_REL_COPY	Click the Create and Relate a New Case button on the Related Cases page.	Specify the relationship details when you create a new related case; specify which information from the originating case to copy into the case that you are creating.

Reviewing and Initiating Case Relationships

Access the Related Cases page.



Related Cases page

Note. If the case is secured, the message *Secured* appears instead of the case summary. This message comes from the message catalog so that you can easily modify the text.

The Existing Related Cases grid lists all existing case relationships.

Relationship — Describes how the current case is related to the related case. If the relationship is hierarchical, the parent case and the child case can have different values in this field. For example, one value might be *Global Case* and the other value might be *Ticket.* If the relationship is equivalent, there is only one valid label.

Type — The relationship type. This value is the same for both cases in the relationship. For example, if your organization established a relationship type called *Global*, then both the parent and child record have *Global* in the Type column.

Case — The case number of the related case. Click the case number to display the related case.

Customer and **Contact** — If this is a PeopleSoft Support case, these fields identify the customer and contact who are associated with the related case.

Employee (employee ID) and **Employee Name** — If this is a PeopleSoft HelpDesk case, these fields identify the employee who is associated with the related case.

Status — The status of the related case (from the Case Status field for that case).

Date Added — The date and time that the relationship was established.

Delete — Click to delete the case relationship. This does not delete either case, only the relationship.

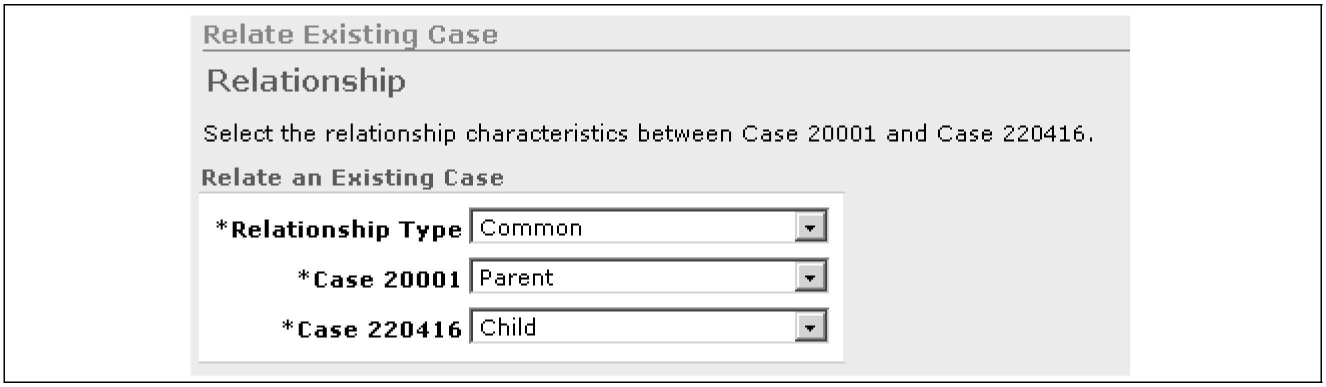
Creating New Case Relationships

Relate an Existing Case — Click to display the Relate Existing Case - Search page, where you identify an existing case to relate to the current case. After you identify the case, the system displays the Relate Existing Case - Relationship page, where you establish the relationship between the cases.

Create and Relate a New Case — Click to display the Create a New Case - Relationship page, where you can choose the information to be copied to the new case and establish the relationship between the cases.

Specifying Relationship Details When Relating a Case to an Existing Case

Access the Relate Existing Case - Relationship page.



Relate Existing Case - Relationship page

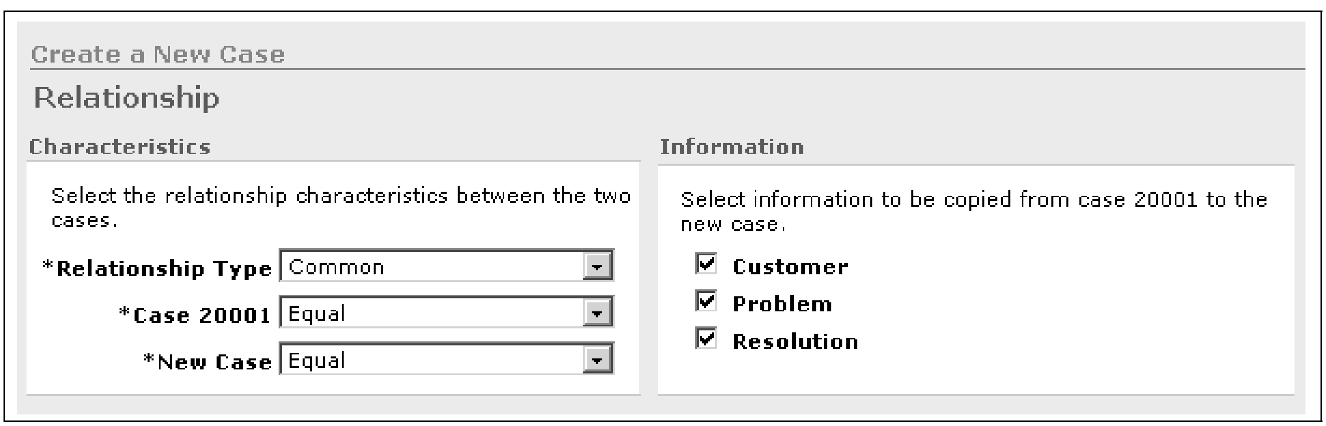
Relationship Type	Specify a relationship type. Relationship types can be either hierarchical (parent-child) or non-hierarchical. Values are defined by your organization and are based on the business unit of the case.
Case (current case number) and **Case** (related case number)	Select relationship labels for the current case and the case that you're relating to it. If the relationship is hierarchical, there is one valid label for the parent case and one valid label for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship. If the relationship is not hierarchical, there is only one valid label. Select that label for both cases. If you select invalid labels (for example, labels that belong to other relationship types), the system displays an error message when you click OK.

See Also

Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Case Relationship Types and Labels, page 45

Specifying Relationship Details When Creating a New Case

Access the Create a New Case - Relationship page.



Create a New Case - Relationship page

Relationship Details

Relationship Type — Specify a relationship type. Relationship types can be either hierarchical (parent-child) or non-hierarchical. 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, there is one valid label for the parent case and one valid label for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship.

If the relationship is not hierarchical, there is only one valid label. Select that label for both cases.

If you select invalid labels (for example, labels that belong to other relationship types), the system will display an error message when you click OK.

Information to Copy to the New Case

The system always copies the business unit to the new case. You choose which other information to copy to the new case.

Customer — In PeopleSoft Support, select this check box to copy the caller from the originating case to the new case. The system copies the customer, contact, site, PIN (person identification number), SIN (site identification number), contact method, and contact details.

Employee — For PeopleSoft HelpDesk applications, select this check box to copy the caller from the originating case to the new case. The system copies the employee number, employee name, phone type, email address type, contact method, contact details, and alternate contact.

Problem — Select to copy problem information from the originating case to the new case. The system copies the problem summary, description, case status, case type, source, priority, severity, impact,error code, error message, resolved on first contact, closed date and time, provider group, assignee, product, problem type, serial number, asset tag, and category, type and detail information.

If you do not copy problem information, the summary for the newly created case identifies the originating case.

Note. If you don't copy caller information to the new case, then the product, serial number, and asset tag that are copied might not be valid for the caller that you identify. In this situation, modify the values before saving the case.

Resolution — Select this check box to copy resolution information from the originating case to the new case. The system copies all attempted resolutions and their statuses, but not the resolution notes.

OK — Click this button to create the new case, establish the relationship between the two cases, and return to the Related Cases page. If you are not copying caller information, the system prompts you to identify the caller for the new case before the case is created. You use the Create a New Case - Search page to select a caller; this page is identical to the Case Search page.

Cancel Click this button to return to the Related Cases page without establishing the relationship.

See Also

Chapter 8, “Managing Cases,” page 99

Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Case Relationship Types and Labels, page 45

Managing Related Actions

This section provides an overview of related actions and discusses how to:

- Review related actions and initiate new relationships.
- Initiate and relate scripts.
- Relate existing quality defects.
- Create new defects.
- Create and relating sales leads.
- Create and relate sales orders.
- Create and relate RMAs.
- Create and relate service orders.

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 Active Analytics Framework suggests an action.

Related Actions for PeopleSoft Support Cases

This table illustrates which related actions you can associate with PeoplSoft Support cases:

Object	Description
Create RMA	An RMA authorizes a customer to return defective or unwanted materials. You can manage RMAs only if PeopleSoft Support is integrated with PeopleSoft Inventory.
Create Workflow	Choose a business project to use. See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Using Business Projects”.

Object	Description
Defect-Create New	Defects identify problems with your products. You can create a new defect.
Relate Existing	Associate existing defects with cases, and you can create defects from cases.
Defect — Related Existing	Associate existing defects with cases, and you can create defects from cases.
Sales lead	Sales leads populate the sales pipeline. You can create sales leads only if you've implemented PeopleSoft Sales.
Sales Order	A sales order records a request for a product that is provided by your company's sales, marketing or field services organization. You can create sales orders only if you've implemented PeopleSoft Order Capture.
Service Order	A service order records a request for a service that is provided by your company's field services organization. You can create service orders only if you've implemented PeopleSoft FieldService.
View Solutions	You can search for solutions.
Branch Script	Launch a specified branch script.

Additional Link Definitions can be set up to launch PeopleSoft Enterprise RealTime Advisor, or a specific branch script, or a specific business project.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates".

Related Actions for PeopleSoft HelpDesk Cases

This table illustrates related actions that you can associate with PeopleSoft HelpDesk cases:

Object	Description
Asset Discovery	Launch a third-party asset management application from a case, to information-gathering tasks on networked devices.
Change Request	Create a change request.

Object	Description
Create Workflow	Select a business project to use. See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Setting Up PeopleSoft CRM Workflow”.
Defect–Create New	Defects identify problems with your products. You can create a new defect.
Defect — Relate Existing	You can associate existing defects with cases, and you can create defects from cases.
Remote Control	Launch a third-party asset management application from a case, to perform troubleshooting on a remote device, such as an employee’s laptop.

In addition to the actions listed, you can set up the system to do any of the support actions, with the exception of customer-facing transactions.

Service Order and Material Return Comparison

When customers report problems with broken or defective parts or materials, you can do one of the following:

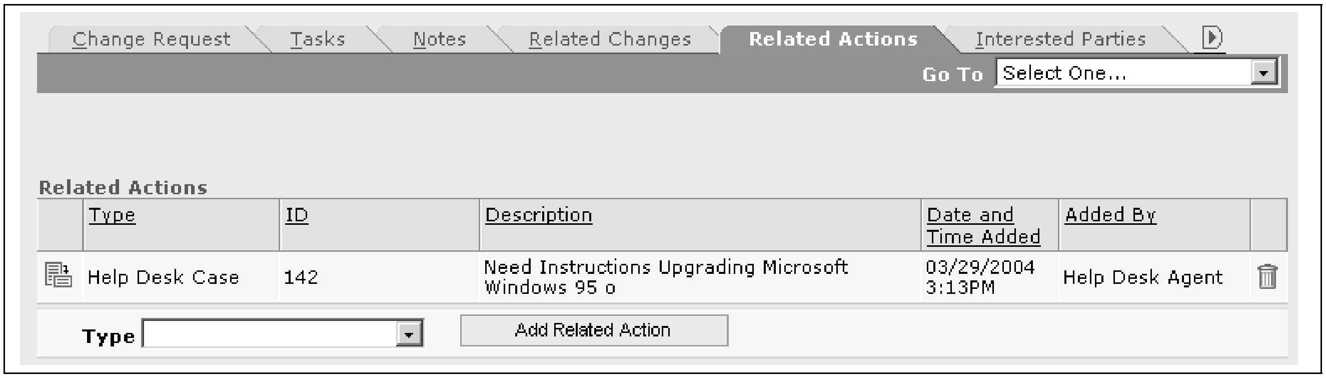
- If the customer is entitled to on-site service, create a service order so that your organization can send a field service technician to the customer’s site to repair the part.
- If the customer is not entitled to on-site service, create a return material authorization (RMA) so that the customer can return the merchandise.

Pages Used to Relate a Case to Other PeopleSoft CRM Objects

Page Name	Object Name	Navigation	Usage
Related Actions	RC_ASSOCIATION	• Support, Create a Case Go to the Actions section. • HelpDesk, Create a Case Go to the Actions section. • HR HelpDesk, Create a Case Go to the Actions section. In this application, the actions are links to pages in the HRMS database. • Support, Search Cases, Case, Related Actions • HelpDesk, Search Cases, Case, Related Actions	Relate a case to other PeopleSoft CRM objects.
Use Branch Script page	RC_LINK_SCRIPT_SEC	On the Case page, Actions section, select Branch Script from the Related Actions drop down, then click the Go button.	Select a branch script to relate to a case.
Defect – Relate Existing	RC_CASE_DEFECT_SEC	On the Related Actions page, select Quality Defect-Relate Existing in the Relate New Object field, then click the Go button.	Search for and identify a defect to relate to the case.
Defect – Create New	RQ_DEFECT_MAIN	On the Related Actions page, select Quality Defect-Create New in the Relate New Object field, then click the Go button.	Add a new defect and relate it to the case.
Create RMA	RC_RMA_HDR	On the Related Actions page, select Return Material Authorization in the Relate New Object field, then click the Go button.	Create an RMA and relate it to the current case.
Create Sales Lead	RC_LINK_LEAD_SEC	On the Related Actions page, select Sales Lead in the Relate New Object field, then click the Go button.	Create a sales lead and relate it to the current case.
Create Order	RC_LINK_RO_SEC	On the Related Actions page, select Sales Order in the Relate New Object field, then click the Go button	Create an order and relate it to the current case.
Create Service Order	RC_LINK_RO_SEC	On the Related Actions page, select Service Order in the Relate New Object field, then click the Go button.	Create a service order and relate it to the current case.

Reviewing Related Actions and Initiating New Relationships

Access the Related Actions page.



Related Actions page

Note. If the case is secured, the message *Secured* appears instead of the case summary. This message comes from the message catalog so that you can easily modify the text.

Related Actions Summary

This grid lists all existing relationships between the current case and other PeopleSoft CRM objects.

Type The type of related object: customer satisfaction script, lead qualification script, troubleshooting guide, business project, sales lead, sales order, RMA, or service order.

Summary A description of the object, derived from the description field on the page where the object is maintained.

Associated Date The date that the object was associated with the case.

Relate New Action

Relate New Action 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.

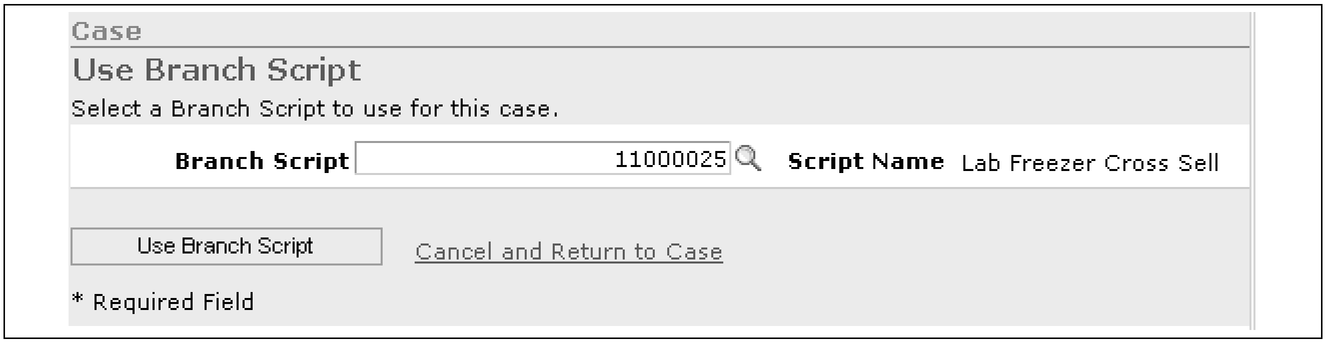
To alter the list of values that appear, access the Industry Specific Translates page for Field Name RC_ASSOC_TYPE (Support) and RC_ASSOC_TYPE_HD (HelpDesk). Then inactivate the fields that you don't want to appear.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Modifying Industry-Specific Translate Values.

Go After you select an action, click Go to access the page where you enter information specific to the type of object that you're creating.

Initiating and Relating Scripts

Access the Use Branch Script page.



Use Branch Script page

Branch Script Select the desired script from the list of predefined scripts available in the list.

Use Branch Script Click to launch the script on the Execute Script page. Once you launch the script, the relationship between the case and the script is established.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Defining Scripts”

Relating Existing Quality Defects

Access the Defect – Related Existing page. On this page, you can sort and filter to narrow down your list of defects, or you can search for other defects.

Business Unit Select the business unit for the defect you want to relate. The default comes from the Business Unit (Quality) field in the Call Center BU page.

Defect ID Select the defect that you want to relate to the current case.

See Also

Chapter 2, “Defining Call Center Business Units and Display Template Options,” Defining Call Center Business Units, page 12

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework”

Creating New Defects

Access the Defect – Create New page.

Creating and Relating Sales Leads

Access the Create Sales Lead page.

Note. Only PeopleSoft Support users can create sales leads; this functionality is not available in PeopleSoft HelpDesk applications.

Business Unit Select a sales business unit for the lead that you're creating. The default comes from the Business Unit SFA field on the Call Center BU page.

Description Enter a description for the new lead.

Create Sales Lead Click to create the lead.

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, "Creating Sales Leads and Opportunities"

Creating and Relating Sales Orders

Access the Create Order page.

Note. Only PeopleSoft Support users can create orders; this functionality is not available in PeopleSoft HelpDesk applications.

Business Unit Select an order business unit for the order that you're creating. Business units are limited to those using the same customer setid as the case.

Description Enter a description for the new order.

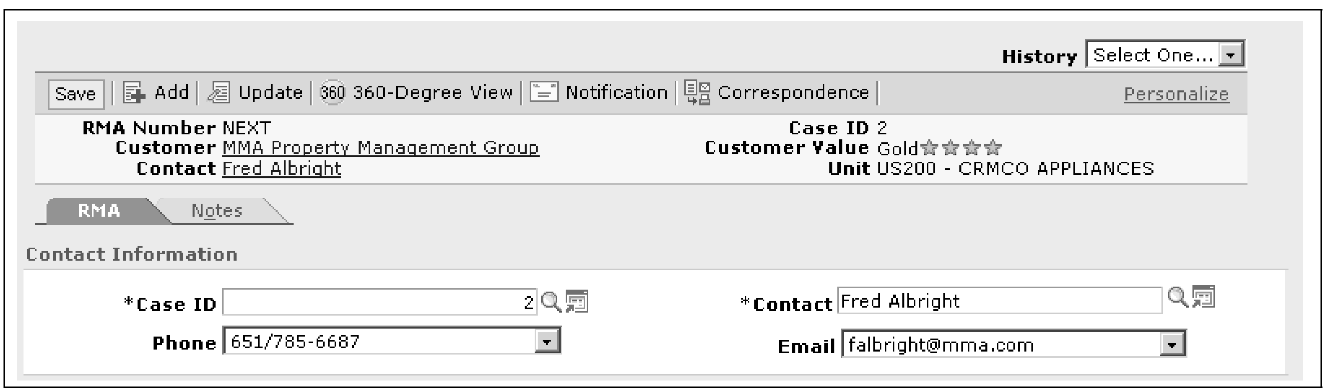
Create Order Click to create the order.

See Also

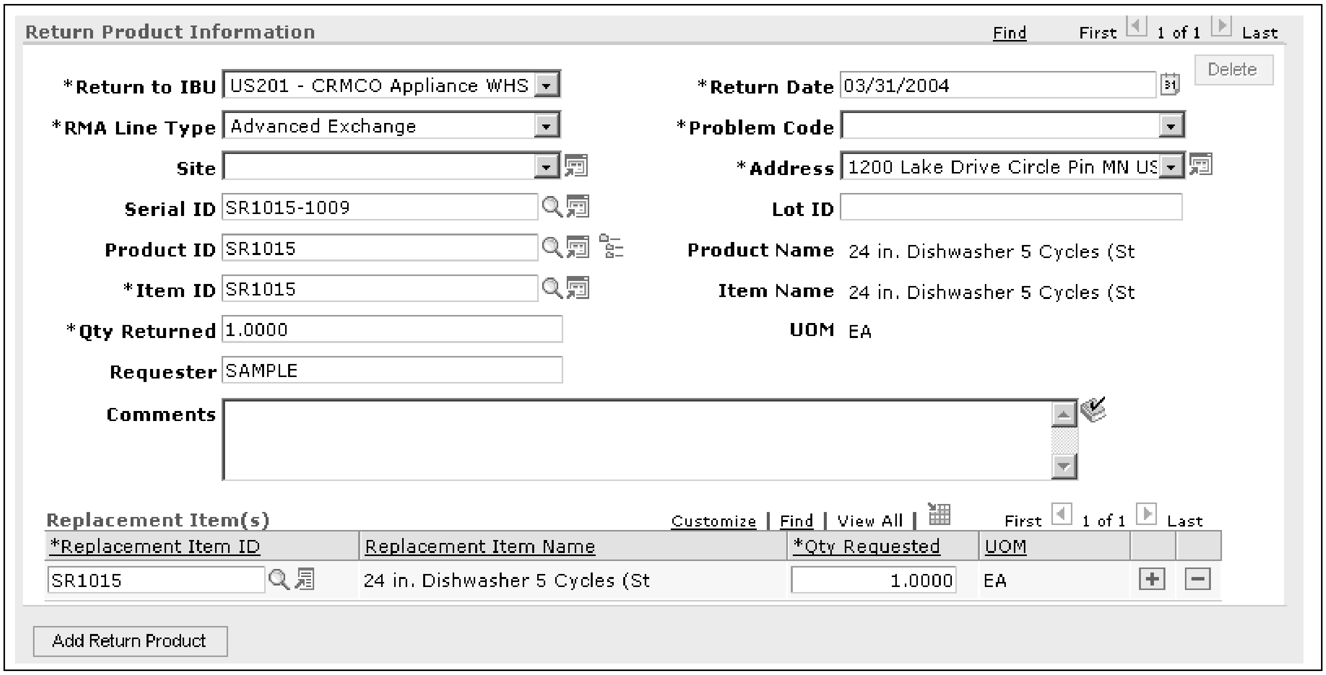
PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

Creating and Relating RMAs

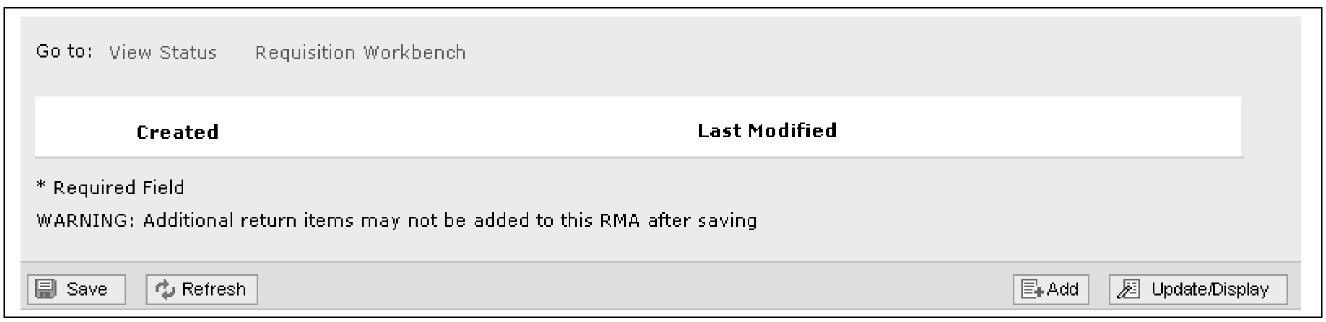
Access the Create RMA page.



RMA page (1 of 3)



RMA page (2 of 3)



RMA page (3 of 3)

Note. Only PeopleSoft Support users can create RMAs; this functionality is not available in PeopleSoft HelpDesk applications.

See Chapter 12, "Managing Material Returns," page 181.

See Also

Chapter 12, "Managing Material Returns," Understanding Material Return Processing, page 181

Creating and Relating Service Orders

Access the Create Service Order page.

Note. Only PeopleSoft Support users can create service orders; this functionality is not available in PeopleSoft HelpDesk applications.

Business Unit	Enter a business unit for the service order that you're creating. The default comes from the Field Service Unit field in the Call Center BU page.
Service ID	Select the service that is to be performed.

Create Service Order Click to create the service order.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Creating and Managing Service Orders"

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 this 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 Send Notification page includes a check box that you can select to send the notification to the interested parties in addition to any other addressees.

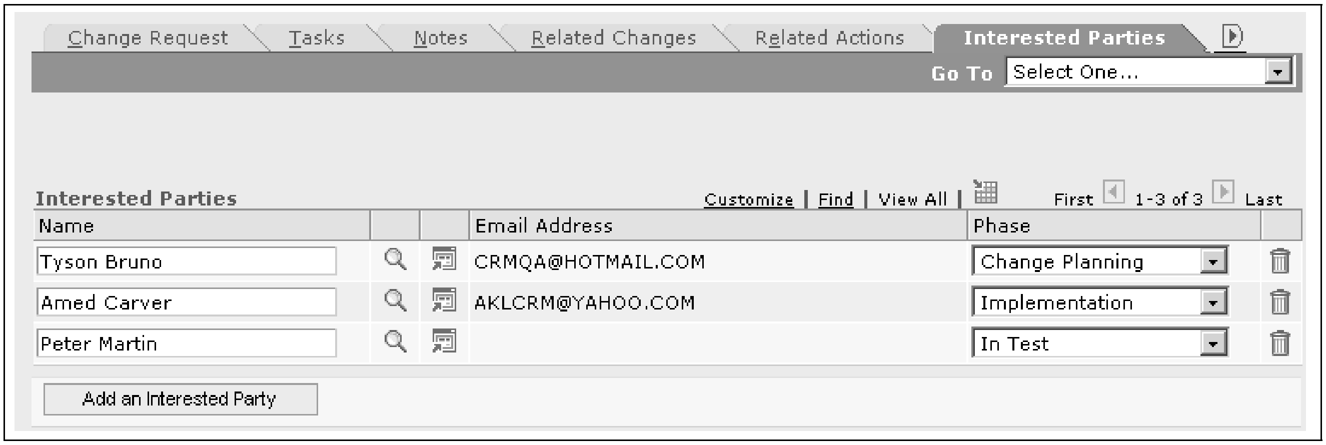
Note. This page is delivered hidden. If you want to identify interested parties on the case, you will need to modify the template to enable the page. Also, use the display template to enable the Interested Parties section on the Case Summary page, or on the infomation section of the Main case page.

Page Used to Identify Interested Parties

Page Name	Object Name	Navigation	Usage
Interested Parties	RC_INTEREST_PARTY	• Support, Search Cases, Case Select the Add Interested Partiesbutton on the Main Case page. • Support, Search Cases, Case, Interested Parties • Support, Create a Case, Case Select the Add Interested Partiesbutton on the Main Case page. • Support, Create a Case, Interested Parties • HelpDesk, Search Cases, Case Select the Add Interested Partiesbutton on the Main Case page. • HelpDesk, Search Cases, Case, Interested Parties • HelpDesk, Create a Case, Case Select the Add Interested Partiesbutton on the Main Case page. • HR HelpDesk, Create a Case, Interested Parties • HelpDesk, Search Cases, Case Select the Add Interested Partiesbutton on the Main Case page. • HelpDesk, Search Cases, Case, Interested Parties • HelpDesk, Create a Case, Case Select the Add Interested Partiesbutton on the Main Case page.	List the names of people who might want to receive information about this case.

Identifying Interested Parties

Access the Interested Parties page.



Interested Parties page

Name

To be an interested party, a person must have a person record in the PeopleSoft CRM database.

For the system to send notifications to the person, the person must have a user ID (for worklist notifications) or an email address (for email notifications).

Reason Code

The reason that the person is included as an interested party. Your organization defines values based on the business unit of the case.

Date Added

The date and time that the person was added as an interested party.

Recording Billing Information

PeopleSoft allows the PeopleSoft Support and Support vertical applications to bill for their services. Cases with an agreement will be billed through contracts. Cases with a Warranty, or no Agreement are called On Demand and will be sent into the contract interface table, and then on to billing. The contracts system will take 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.

See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook*, “Setting Up an Integration to PeopleSoft Transaction Billing Processor,” Understanding PeopleSoft CRM Integration with PeopleSoft Transaction Billing Processor.

Note. This functionality is not available to Help Desk and HR Help Desk.

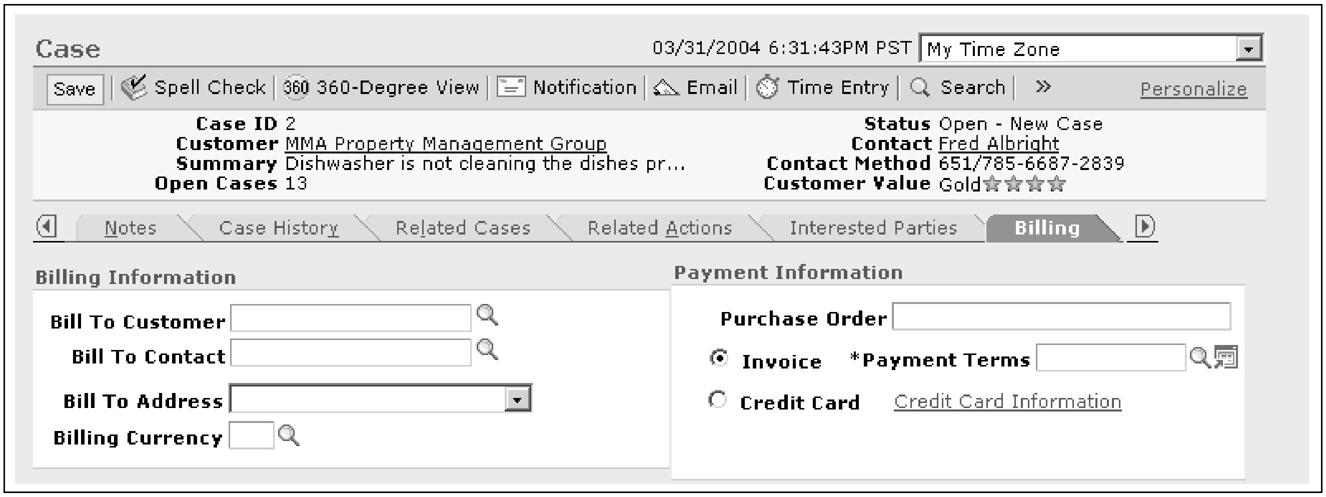
Note. You can control access to the billing page using regular role based security. Only the manager’s role has access; agents do not have access.

Page Used to Record Billing Information

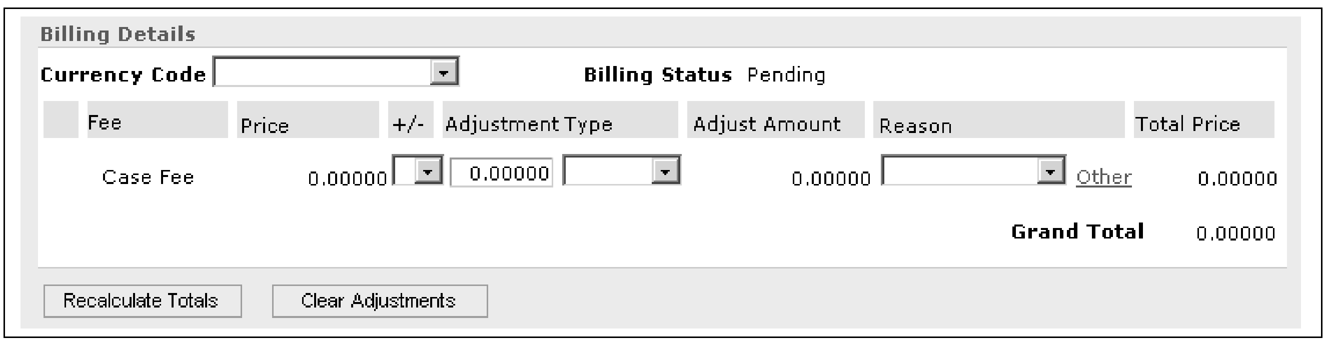
Page Name	Object Name	Navigation	Usage
Billing	RC_CASE_BI	From a case page, select Billing.	View page to manage billing information for a case.

Recording Billing Information

Access the Billing page.



Billing page (1 of 2)



Billing page (2 of 2)

This page serves multiple purposes. It enables a user with a manager role to view billing information, purchase order numbers, and credit card authorization information for thecase that is performed at the customer site. It also enables users to view subtotals for fee by case or time, apply adjustments to transaction fees, recalculate totals, and view the billable amount in the customer currency.

Billing Information

the system populates this group box with information from the bill to customer on case.

Bill to Customer Select the customer that should be billed for the case.

Bill To Contact Select the contact that should be billed for the case.

Bill To Address Select the customer address to which the bill should be sent.

Bill Currency Select the currency that the customer is using for the transaction.

The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice.

Payment Information

Purchase Order

Enter the customer-provided purchase order number.

Note. This field does not have any integration to PeopleSoft Supply Chain Management (PeopleSoft SCM) and is not required. If you enter a purchase order number in this field, the system posts it to PeopleSoft Contracts. When PeopleSoft Contracts sends the information to PeopleSoft Billing for invoice generation, the system prints the purchase order number on the invoice.

Invoice

Select if the customer intends to pay for the service by invoice.

Payment Terms

If you selected the Invoice option, use this field to select the billing cycle for the invoice (for example, *NET30 - Due in 30 days*). The payment terms appear on the invoice that is sent to the customer.

Credit Card

Select if the customer intends to pay for the service by credit card. The system displays the Credit Card Information link after you select this option.

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.

See *PeopleSoft Enterprise Components for CRM 8.9 PeopleBook, "Setting Up the Credit Card Interface"*

Tax Parameters

Click this link 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, and it applies to either on demand case or agreement case. When a case is created with agreement, and pricing is enabled from installatoin option, the case is billed based on transaction fee defined in that agreement lne. It could either flat fee or time based. When a case is created without agreement, on demand case fee is applied. Based on BU setup (whether the on demand case is by time or by case), it retrieves pricing information from pricing setup for either case based or time based. When a case is billed by case, only a flat fee is applied. When a case is billed by time, it will be billed based on the total billable hours worked on that case, mulitplied by the hourly rate. Once the case is billed, no more billable hours can be entered.

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.

Click the Expanded button to the left of the Fee column to view all billable amounts that were included in the price for a given fee.This is only applicable when case is billed by time.

Adjustment

Enter either a dollar amount or a percentage value.

Type

Select *Percent* or *Amount.*

Reason

Select the reason for the adjustment. These values are user-definable. 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.

Extended Price

This value is calculated when you click the Recalculate Totals button. The system sums the total of the price, plus or minus any adjustments.

Recalculate Totals

Click this button any time there is a change to the Billing Details grid that impacts the price or the currency code. The system recalculates the total cost of the fees.

Clear Adjustments

Click this button to clear the adjustments that were made and return to the original total amounts.

CHAPTER 10

Tracking Time Spent on Cases

This chapter provides an overview of time tracking and discusses how to manage time.

Understanding Time Logs

In PeopleSoft CRM, a time log is automatically generated for every case created in the system. A case time log is prepopulated with the case's assigned agent name and its start date and time. Time logs are stored in the PeopleSoft database for informational purposes. You can design your own reports and processes to leverage the time data captured for each case. PeopleSoft PeopleSoft Support and HelpDesk delivers a Crystal report that shows the average time that each support or help desk agent spent to close a case.

Note. If you log time for a task that spans multiple days, it is highly recommended that you enter time report for each work day (that is, start and end dates are identical), which allows 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. of June 6 through 10 a.m. of June 8. If you enter the entire period of time in one time log entry, the system includes the nonwork hours during this time period when it calculates the total number of hours you spent on this task. In this scenario, June 7 becomes a 24–hour work day even though you actually worked eight hours on that day. To make sure the system captures work hours accurately, log time for each work day that you spend on the task by adding rows to the task's time log.

See Also

Appendix C, "PeopleSoft CRM Call Center Reports," page 273

Managing Time

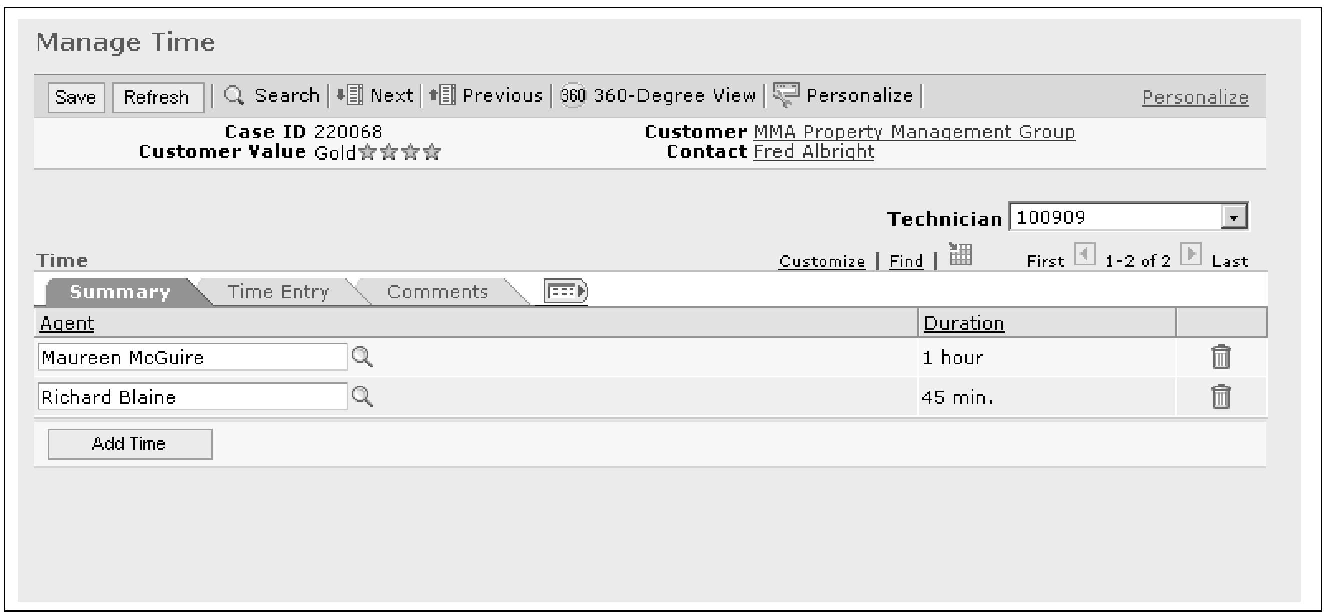
This section discusses how to log time that is spent working on cases.

Page Used to Manage Time

Page Name	Object Name	Navigation	Usage
Manage Time	RF_TIME	• Support, Time, Manage Time • Click the Time Entry button on the toolbar of the Case component of PeopleSoft Support, HelpDesk or HelpDesk for Human Resources, or the Issue component of PeopleSoft CRM for Financial Services.	Log the actual period of time spent to complete a case.

Logging Time

Access the Manage Time page.



Manage Time page

Each case is associated with only one system generated time log (each with 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.

Technician	Select the ID number of the technician who is responsible for service on the case.
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.

Summary Tab

The Summary tab lists the agents who spent time on the case and the duration for the block of time that they entered. Each entry represents a block of time the person spent working on a case. Add additional entries to represent work that stops and starts or is performed by other workers.

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).
Duration	Displays the amount of time the agent entered for that specific row.

Time Entry Tab

Use the Time Entry tab to enter time associated with the case. Each entry represents a continuous block of time that one person spent working on a case. Add additional entries to represent work that stops and starts or that is performed by other workers.

Note. Do not enter overlapping time periods in the entries of a time log. In other words, make sure the start time of the next time log entry is always later than the end time of the current time log entry.

Start Date and **Start Time**	Enter the date and time that the work began on the case. The system uses the information the end date and time fields to calculation duration on the Summary page
Start Date and **Start Time**	Enter the date and time that the work ended on the case.

Comments

Enter any comments related to the time that you entered.

See Also

Chapter 8, "Managing Cases," page 99

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Configuring Toolbars"

CHAPTER 11

Managing Credit Card Payments

This chapter provides an overview of credit card processing and discusses how to process credit card payments and review transactions.

Note. This chapter is relevant to PeopleSoft Support only; PeopleSoft HelpDesk and PeopleSoft HelpDesk for Human Resources do not incorporate credit card functionality.

Understanding Credit Card Processing

If your organization accepts credit cards in payment for support, you use the Authorize Credit Card page to manage this process. This page is not available when the case is associated with an agreement where this form of payment (pay for service) is inapplicable.

See *PeopleSoft Enterprise Components*

This section discusses:

- Processing options.
- Credit card transactions.
- Transaction process flow.

Processing Options

Credit card processing depends on whether you use a third-party credit card authorization and payment vendor.

If you entered a merchant ID on the setup page, these conditions occur:

- The Authorize Credit Card page contains a Submit button that agents use to submit transactions.
- The Authorize Credit Card page requires you to enter information that your third-party credit card authorization and payment vendor requires.

If you did not enter the merchant ID, there are no required fields on the Authorize Credit Card page. This page does not have a Submit button; instead, the page captures information for use with your organization's own solution for processing credit card payments.

Credit Card Transactions

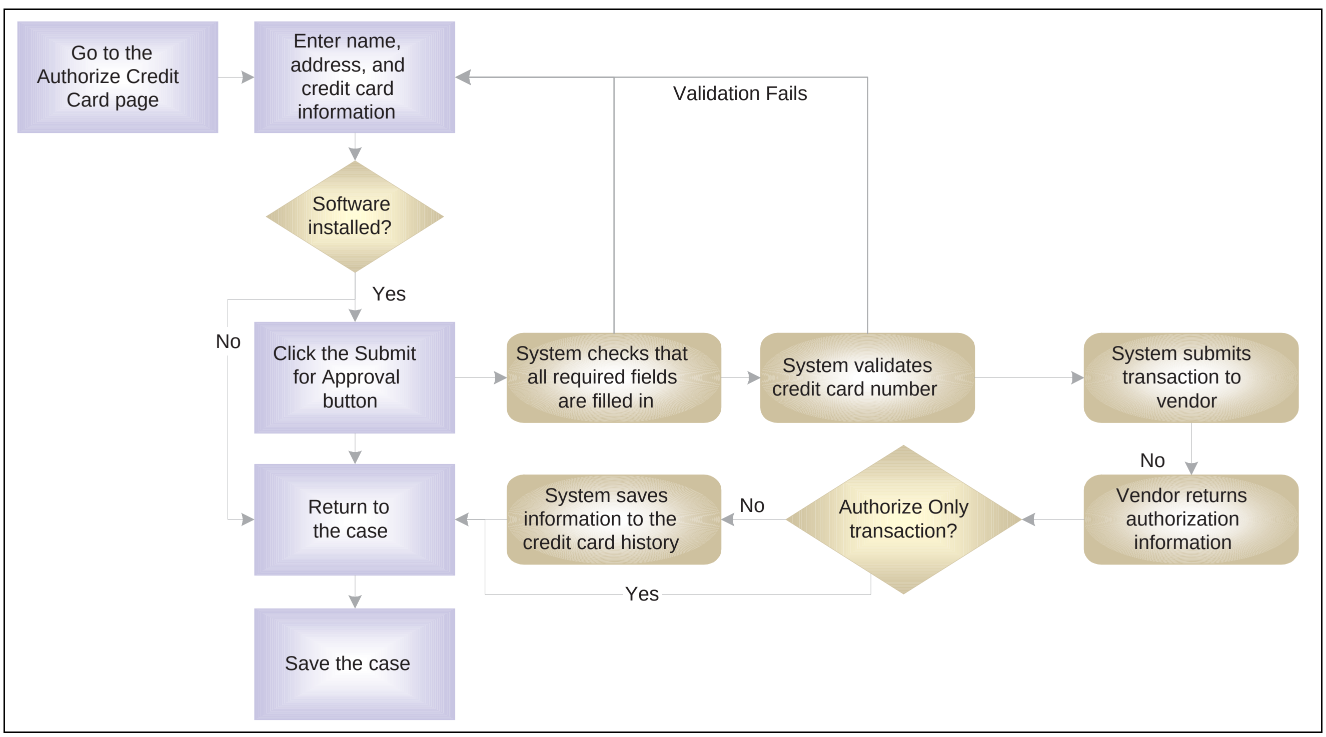
PeopleSoft Support facilitates credit card processing through integration with third-party credit card authorization and payment vendors.

Depending on how your organization has configured your credit card processing, some or all of these transaction options are available:

Transaction Option	Processing
Authorize Only	Verifies that the card is valid for the charge (the customer has enough credit to pay for the order, the card is not stolen, and so on). The vendor does *not* bill the credit card.
Bill Only	Bills the card without first verifying that the card is valid for the charge. Select this option if you have pre-authorized the transaction and you want to submit the transaction for billing only.
Authorize and Bill	Performs both authorization and billing. The vendor charges the customer's credit card upon receiving authorization.
Credit Only	Credits the customer's credit card.

Transaction Process Flow

This diagram illustrates the credit card transaction process flow. The system performs all credit card validation before submitting data to the vendor, which prevents unnecessary transaction charges.



Credit card processing flow

When the system validates a credit card number, it validates:

- 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 realtime billing or credit transactions.

Processing Credit Cards and Reviewing Transactions

This section discusses how to:

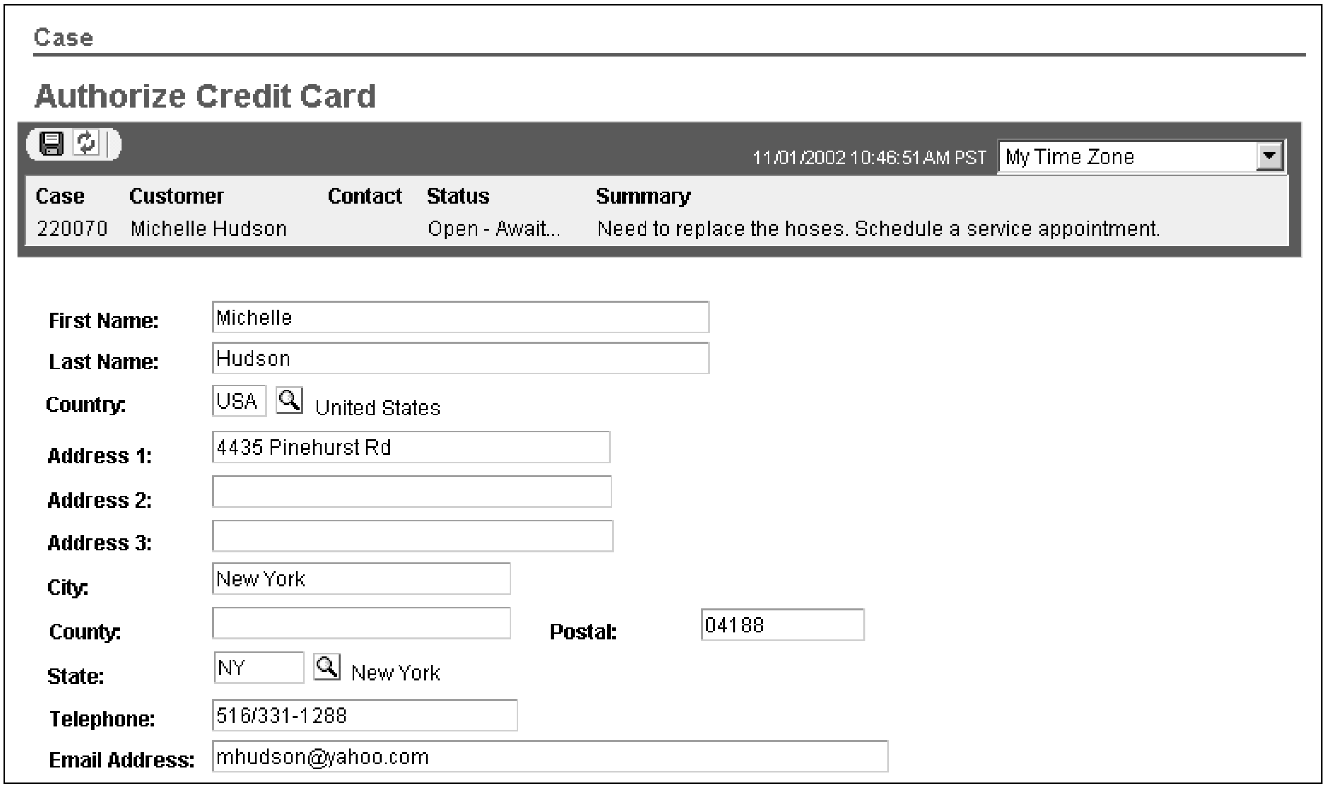
- Submit credit card information for authorization.
- Review credit card transactions.

Pages Used to Process Credit Cards and Review Transactions

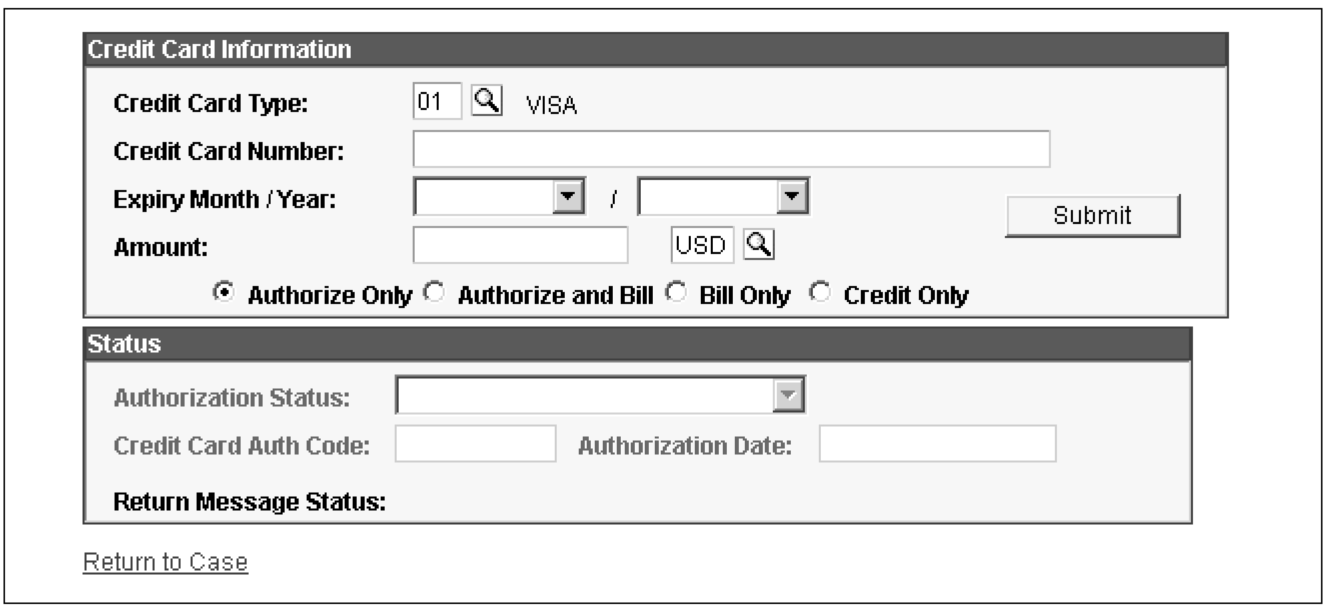
Page Name	Object Name	Navigation	Usage
Authorize Credit Card	RC_CARD_INFO	• Support, Support Case, Case • Click the Credit Authorization link on the Case page.	Submit a customer's credit card information for authorization.
Review Electronic Card History	RB_CARD_HISTORY	Review Electronic Card History, Electronic Card History	Review credit card transactions that have been submitted for authorization.
Address Secondary Page	RB_CARD_ADDR	Click the Contact Address link on the Review Electronic Card History page.	Review address information that is related to a credit card transaction.

Submitting Credit Card Information for Authorization

Access the Authorize Credit Card page.



Authorize Credit Card page (1 of 2)



Authorize Credit Card page (2 of 2)

First Name, Last Name, Country, Address 1, Address 2, City County, Postal, State, Telephone, and **Email Address**

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.

The system enters the contact's primary address, telephone number, and email address by default. 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.

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.

Note. Credit card numbers that are stored in the database are encrypted for security purposes.

Credit Card Information

This group box displays fields that are generally required by third-party credit card software vendors. All fields are required.

Credit Card Type

Enter a credit card type. Values are based on the credit cards that are designated *Active* on the Credit Card Setup page and may include *AMEX, Diners Club/Carte Blanche, Discover, MasterCard,* and *Visa.*

Credit Card Number

Enter the number of the credit card that is to be charged for the transaction.

Expiry Month/Year

Select the credit card expiration date (2-digit month and 4-digit year).

Note. The *Expiry/Month Year* 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 Customer Relationship Management (PeopleSoft CRM) delivers values that range from 2001 to 2010.

Amount

Enter the amount that is to be authorized.

Transaction Type

The options that are available depend on how your organization has configured credit card processing.

Authorize Only

Select to submit the transaction for authorization only. The vendor verifies that the card is valid for the charge and does not bill the credit card.

Authorize and Bill

Select to submit the transaction for authorization and billing. The vendor performs both authorization, and if the charge is authorized, the vendor charges the customer's credit card.

Bill Only

Select if you have preauthorized the transaction and you want to submit the transaction for billing only. The vendor bills the card without verifying that the card is valid for the charge.

Credit Only

Select to submit a credit transaction. The vendor credits the customer's credit card.

Submit

Click to validate all of the data on the page. If the system finds missing or invalid data, an error message explains 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, you will have no record of the completed transaction in your system.

Status

This group box displays authorization information for the credit card transaction.

Authorization Status

Select the status of the authorization attempt.

These statuses are examples and may not be suitable for all vendors:

Unprocessed/Retry: Transaction has not been processed or is a failed credit card process and is being resubmitted.

Authorized: Transaction is approved. The funds are reserved for the transaction.

Credited: A credit has been authorized and processed for the transaction. The funds are credited back to the specified credit card.

Denied: Transaction has failed credit card processing and has been declined, or disallowed, by the company issuing the credit card.

Billed: Transaction is complete. Funds are charged to the credit card. Billed transactions must be preceded by an authorization.

Authorized and Billed: Signifies successful output from the background settlement process.

Manually Approved/Settled: Transaction is approved. Someone contacted the credit card service to obtain verbal approval.

Change to Terms: Payment type has been changed from credit card to payment terms.

Cancel Order: Transaction is cancelled and is not subject to further processing.

Processing: Transaction has been submitted for approval and is awaiting results.

Credit Card Auth Code (credit card authorization code)

Enter a reference number for an authorized transaction.

Authorization Date

Enter the date that the transaction was authorized.

Return Message Status

Displays a message regarding the authorization. For example, if a link is not working, you might see *Interlink Error.*

Return to Case

Return to Case

Click to return to the Case page.

If you entered information on the Authorize Credit Card page, then returned to the case without submitting the transaction for authorization, the system displays a warning message.

If you return to the case without submitting the transaction, the information still appears on the Authorize Credit Card page and is saved to the credit card history when you save the case, even though the authorization status 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.

Reviewing Credit Card Transactions

Access the Credit Card Process History page.

These field definitions describe only the fields that do not correspond to similarly named fields on the Authorize Credit Card page.

Business Unit, Case Number, and **Sequence Number**	The business unit and case number identify the case where the credit card charge originated. If multiple credit card transactions are associated with a case, the sequence number differentiates the transactions.
Return Message Status, Message 1, Message 2, and **Message 3**	Displays information regarding your authorization, billing, or credit request.
Address Verification Service	Displays address verification results. An example is *Exact Address Match.*
Contact Address	Click to access the Address Secondary page, where you can review the address information used to process the credit card transaction.

CHAPTER 12

Managing Material Returns

This chapter provides an overview of material return processing and discusses how to:

- Set up material return processing.
- Create return material authorization (RMA) transactions.

Understanding Material Return Processing

If you integrate PeopleSoft Support with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, call center agents can generate RMAs for customers returning stock for replacement, repair, or stock that was shipped in error.

This section discusses:

- RMA process flows.
- RMA notifications.
- Default values for RMA lines.

We discuss this information in the documentation for understanding requisitions and understanding purchase orders.

See *PeopleSoft Purchasing PeopleBook.*

Note. This chapter is relevant to PeopleSoft Support only; PeopleSoft HelpDesk applications do not incorporate RMA functionality.

RMA Process Flows

Agents using PeopleSoft Support can create four types of RMAs:

- Advanced exchange
- Return-and-replace
- Repair-and-return
- Return-to-stock

Basic RMA Processing

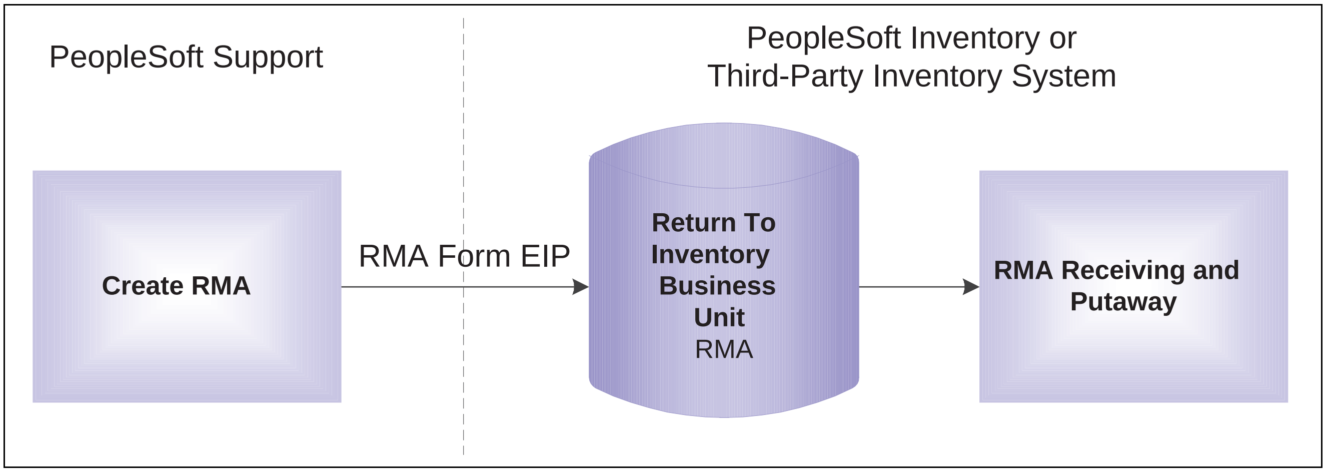
Regardless of RMA type, some processing steps are shared by all RMAs that are created in PeopleSoft Support:

1. A customer calls the agent and requests an RMA.
2. The agent opens a new or existing case for the customer and creates an RMA in PeopleSoft Support.

3. When the agent saves the RMA, the system uses an EIP (enterprise integration point), 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:



Basic RMA processing flow

We discuss this information in more detail in the documentation for defining PeopleSoft Financials and Supply Chain Management general options.

See *PeopleSoft Enterprise 8.8 Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management PeopleBook.*

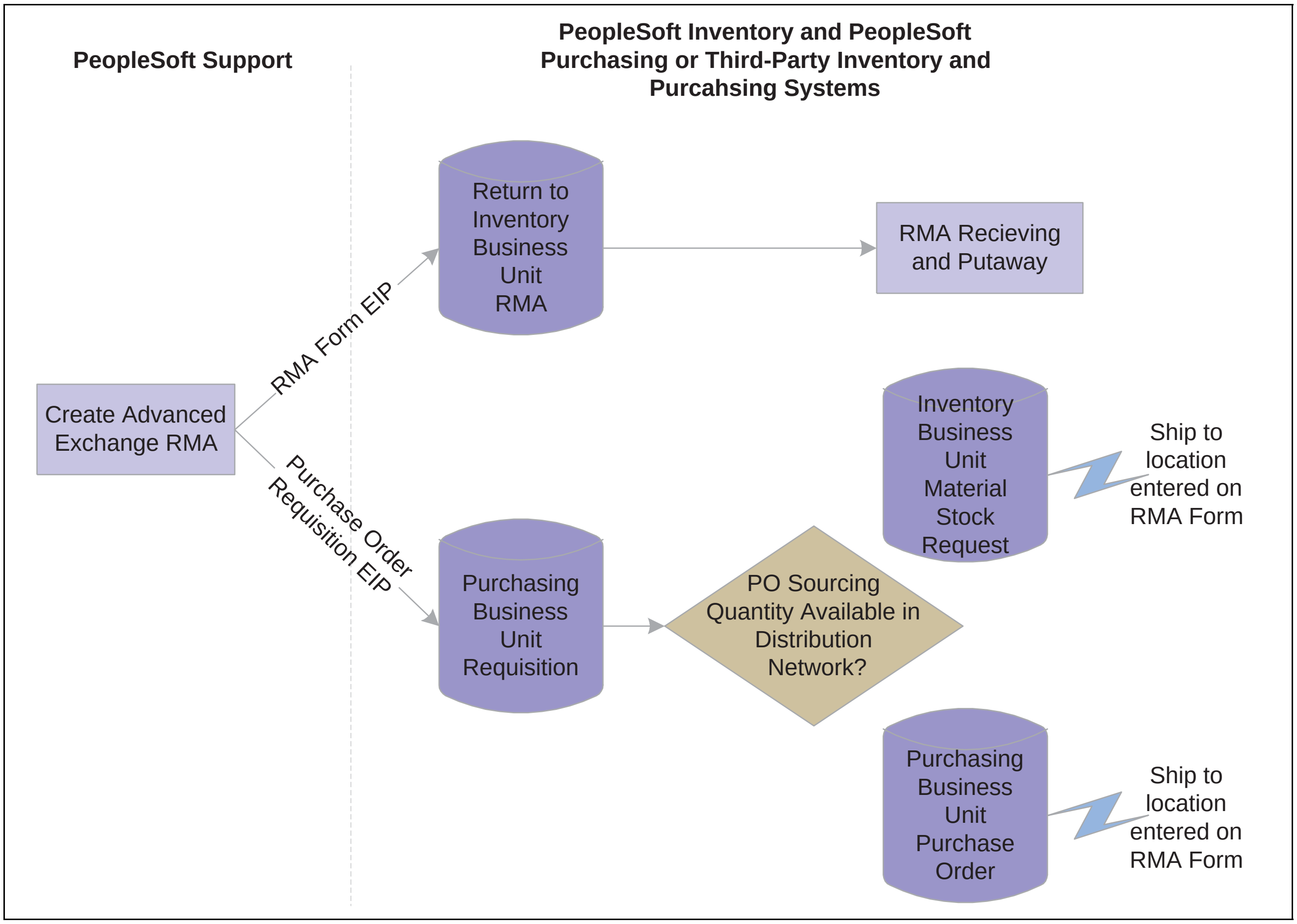
Advanced Exchange RMAs

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 for the item 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 introducing enterprise integration points, understanding the EIP catalog.

See *PeopleSoft Integration Tools and Utilities.*

This diagram illustrates the advanced exchange RMA processing flow:



Advanced exchange RMA processing flow

The Purchase Order Requisition EIP enables you to requisition a replacement for the customer at the time that the advanced exchange RMA is created.

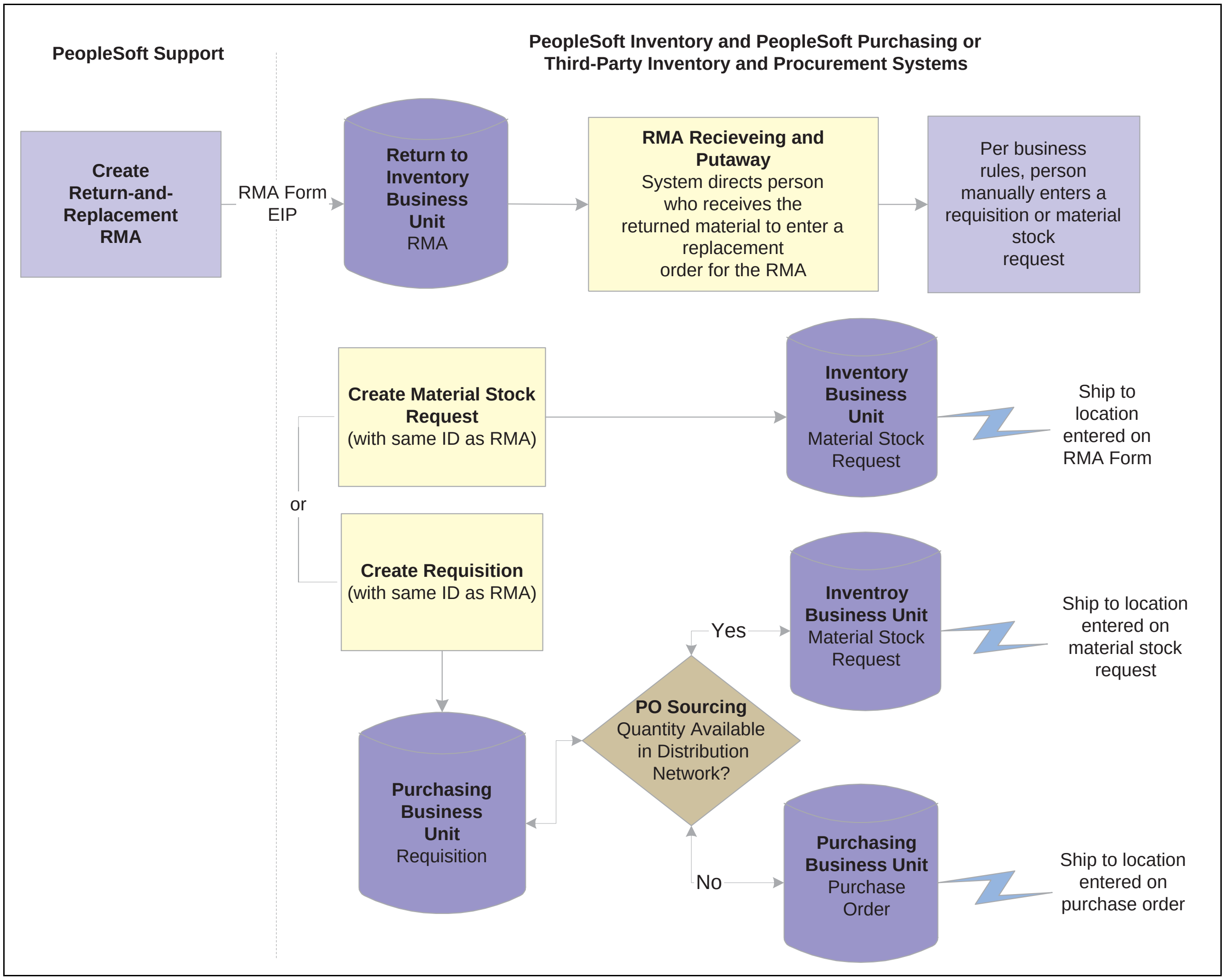
Note. PeopleSoft Purchasing or your third-party purchasing system handles the processing of the requisitions that are staged by the Purchase Order Requisition EIP. In your purchasing system, you must set processing defaults for the staged requisitions and perform any required actions to complete the ordering process.

Return-and-Replace RMAs

Unlike the advanced exchange RMA, orders for return-and-replace RMAs are not created until the returned material has been physically received in the location specified as the return-to business unit.

1. When a person records receipt of material on a return-and-replace RMA in your inventory system, the inventory system displays a message indicating that a replacement order is required.
2. Depending on your business process rules, the person manually enters a material stock request in your inventory system or a requisition in your purchasing system to replace the customer's returned material.
3. The person receiving the returned material uses the information on the RMA, such as the customer's address, information about the item, and quantity returned, to create the replacement order.
4. To facilitate tracking of the replacement order in your inventory or purchasing systems, the same ID as the RMA should be used when the person manually creates replacement requisitions or material stock requests.

This diagram illustrates the return-and-replace RMA processing flow:



Return-and-replace RMA processing flow

For return-and-replace RMAs, replacement orders are manually created in your inventory or purchasing systems after the returned material has been physically received from the customer.

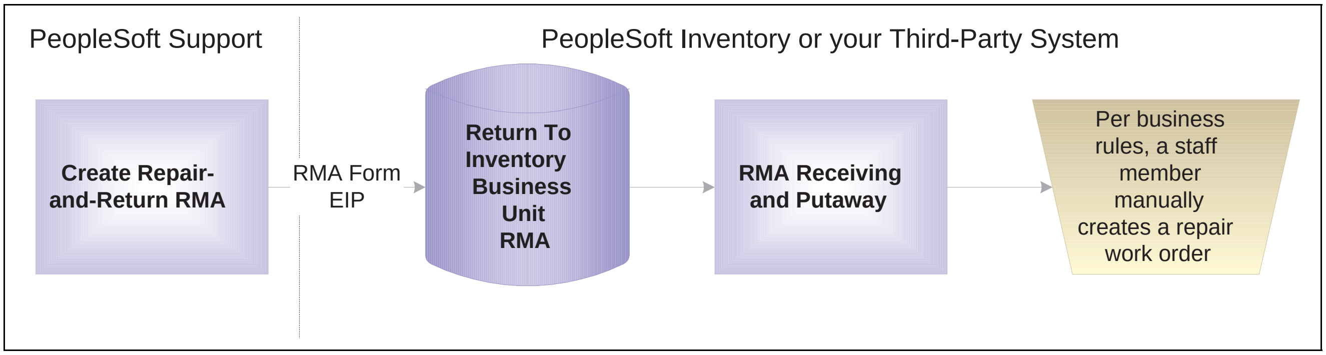
Repair-and-Return RMAs

You create repair-and-return RMAs when a customer sends an item back to you for repair. As delivered, PeopleSoft CRM does not offer repair depot functions. However, if your business includes repair services, you can use the repair-and-return RMA option in conjunction with your business process rules. The repair-and-return RMA processing is similar to return-and-replace RMA processing:

1. A person creates an RMA for a customer in the specified return-to business unit in your inventory system.
2. A staff member, in the facility where the item needing repairs is sent, records the receipt of the RMA in your inventory system.
3. The staff member creates a work order for the repairs, according to your business rules, and delivers the item to the appropriate staff for repair work.
4. The work order should include the ship-to address for the customer who appears on the RMA form and the RMA number (to facilitate RMA tracking across your enterprise).

5. The material is shipped back to the customer using the address information from the RMA when the repair work is complete.

This diagram illustrates the repair-and-return RMA processing flow:



Repair-and-return RMA processing flow

For repair-and-return RMAs, repair work orders are manually created per your business rules when the returned material is physically received from the customer.

Return-to-Stock RMAs

You create a return-to-stock RMA for a customer who is returning material with no need for a replacement. Typically, the customer has received the wrong shipment or been shipped too much quantity. The process flow for a return-to-stock RMA is identical to the basic RMA processing flow.

We discuss this information in more detail in the documentation for receiving and putting away stock and transferring stock between business units.

See *PeopleSoft 8.4 Inventory PeopleBook.*

Note. You can create RMAs for customers who return stock for orders that they placed, but decided against 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 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 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 both the Worklist User and Email User check boxes are selected for the person, two notices—an email and a worklist entry—are published each time the workflow process is triggered for an RMA that is created. Define an email address for each person with an email notification preference.

   ---

3. Define valid email addresses for the people who receive email notifications.

   For each person with an email routing preference for RMA notifications, define a primary email address in the Worker component.

   Note. Person IDs defined for the worker are associated with user IDs on the User Profile page under Workforce, Search Worker or the User Profile component under PeopleTools, Security, User Profiles. For workflow notifications to work as designed, link each person in your system to one user ID only.

   ---

4. (Optional) Associate worklist groups with the people who are assigned receiving manager and receiving agent roles.

   When an RMA is created, a worklist entry can be created for the worklist group that is established for the people who are assigned receiving manager and receiving agent roles in your system. A worklist group must first be defined on the Group Worklist Setup page.

See Also

PeopleTools Security.

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers,” Pages Used to Maintain Worker Information

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up and Using Worklists,” Defining Group Worklists

Setting Up Material Return Processing

Successful implementation of the RMA creation functionality depends on several setup steps:

1. Define inventory business units.

   Define business units in your inventory system that represent the warehouses that are to receive returned material. Activate the Business Unit EIP to insert the business units that are defined in your inventory system in the BUSINESS_UNIT_FS table in the PeopleSoft CRM system automatically. This enables you to select the appropriate inventory business unit on the RMA Form.

   We discuss this procedure in more detail in the documentation for transferring stock between business units.

   See *PeopleSoft Inventory PeopleBook.*

2. Synchronize item, product, and customer masters between PeopleSoft CRM and your purchasing and inventory systems.

Activate the Item Master EIP, the Product EIP, and the Customer EIP to populate your PeopleSoft CRM tables with the master data in your inventory and purchasing systems. Alternatively, you can manually enter item, product, and customer information in both PeopleSoft CRM and your inventory system.

3. Define requisition processing defaults in your purchasing system.

   Call center business units in PeopleSoft CRM that can create RMAs must be defined as a valid source of requisitions in your purchasing system. If you are integrating with PeopleSoft Purchasing, use the Requisition Loader Defaults component in PeopleSoft Supply Chain Management to define each call center business unit as a Loader BU. Using the same component, establish processing defaults for requisitions that are staged by the call center business unit, including the purchasing business unit in PeopleSoft Purchasing that is used to process the requisitions.

   When you define procurement options in PeopleSoft Supply Chain Management, you can associate the call center business unit with an appropriate distribution network on the Ship To Locations page. Sourcing processes in PeopleSoft Purchasing can be configured to verify available quantity 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.

   See *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation and Supply Chain Management PeopleBook.*

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 enterprise integration points (EIPs).

   In your PeopleSoft Support and Inventory systems, activate the Return Material Authorization EIP. For advanced exchange RMAs, activate the Purchase Order Requisition EIP in PeopleSoft Support and in your purchasing system.

6. Enable your call center application to create RMAs.

   The ability to create RMAs for cases is a related action that is associated to the display template for PeopleSoft Support cases. If you want to *disable* the ability to create RMAs, remove it as a related action. Also, remove the permissions that allow users to navigate to this page.

   See Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” page 53.

   See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*

   The RMA Unit is the default value that the system uses when RMAs are initiated from a case that is created for the call center business unit.

7. 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 EIP application message is processed.

8. Create a case for a customer.

Create a case using the Case component in PeopleSoft Support. RMAs must be associated with a case in your system. You cannot create an RMA without first creating a case.

See Also

Chapter 2, “Defining Call Center Business Units and Display Template Options,” page 9

Chapter 8, “Managing Cases,” page 99

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Integrating with PeopleSoft Applications”

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Defining Items”

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Setting Up Products”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Understanding Business Object Relationship Model Components”

Creating RMA Transactions

This section discusses how to:

- Create and view RMA transactions.
- Enter RMA.
- Specify or view the address from which the material is returned.
- Specify or view the address to which replacement orders are shipped.
- View installed product records.
- View the installed product hierarchy.
- Add notes and attachments.

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 have saved a case to save an RMA. Typically, a RMA is created from a Case.

See Also

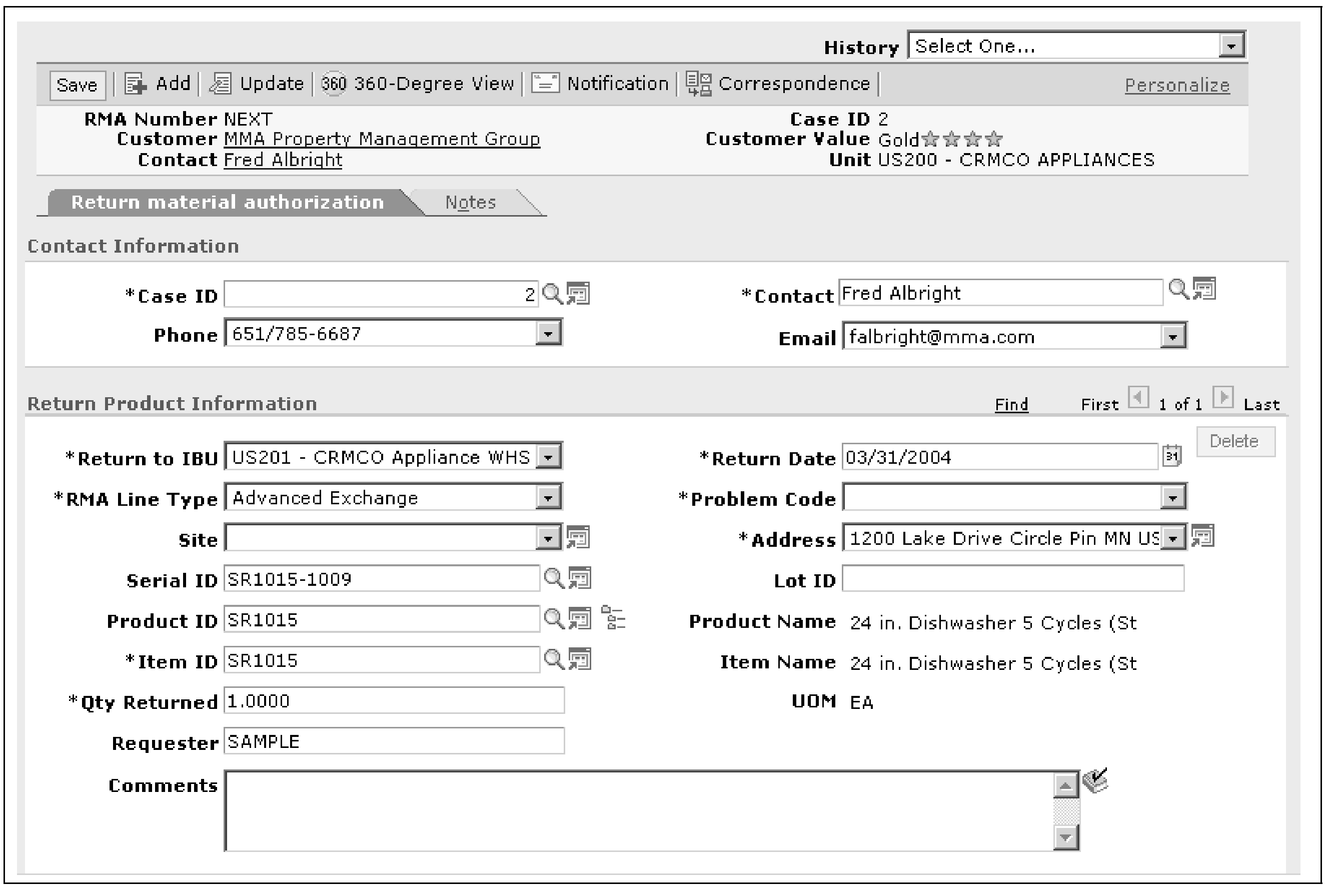
Chapter 9, “Processing Cases,” Managing Related Actions, page 155

Pages Used to Create RMA Transactions

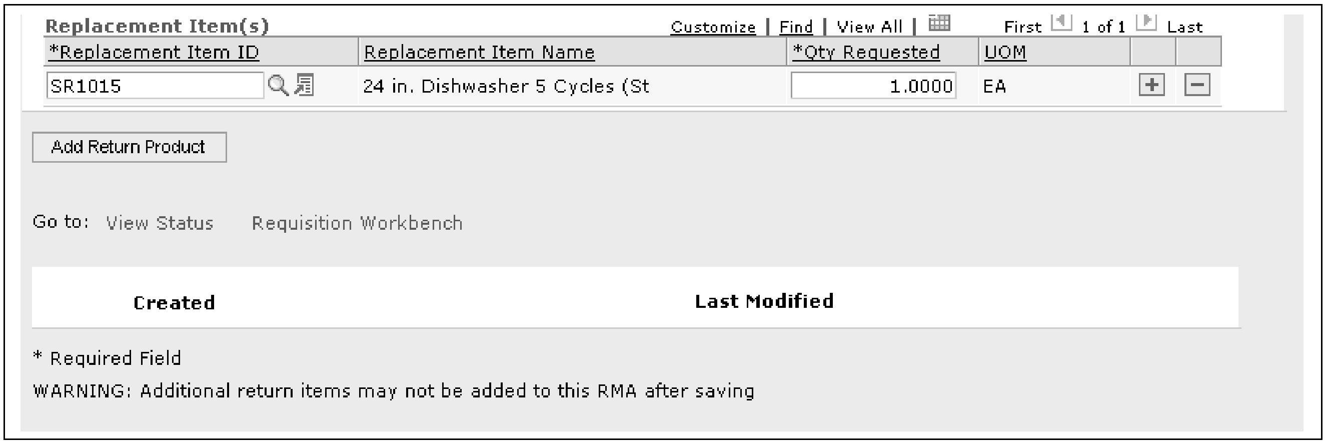
Page Name	Object Name	Navigation	Usage
RMA	RF_RMA_HDR	Support, Returns Support, Create a Case Select Create RMA from the Related Action drop down list box and click the Gobutton.	Create and view RMA transactions.
Notes	RF_RMA_NOTE	Select the Notes page on the RMA component.	Record comments and attach files that are related to an RMA.
Installed Product Viewable Hierarchy ,	RF_INSTPROD_VH_SEC	Click the View Inst Product Hierarchy button on the RMA page.	View the installed product hierarchy for the specified customer.

Creating and Viewing an RMA Transaction

Access the RMA page.



RMA page (1 of 2)



RMA page (2 of 2)

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, where you can view the status of the RMA. 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.

Line Defaults

Provides default information for each RMA line that you add. The information that is defined in these fields can be modified for each RMA line.

Toolbar

This section displays information about the customer who is returning the material:

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 an RMA can be created and saved, a case must have been created, and a ship-to role must be defined for the customer defined on that case.

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.

Case ID

The unique identifier of a case.

Customer Value

If you have purchased PeopleSoft Enterprise Strategic Account Management, this indicator reflects the standing of the customer within your organization's customer portfolio.

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook*, "Understanding PeopleSoft Strategic Account Planning," Reporting and Metrics.

Contact Information

This section displays information about the customer who is returning the material:

Case ID
The unique identifier of a case. When you create a new RMA, you must specify an existing case ID before you save the RMA. You cannot change the Case ID on an existing RMA.

Phone
Select the phone number that is associated with the contact or customer.

Contact
Enter the name of the person who requested the RMA on behalf of the customer. The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value.

Note. A contact is required if the specified customer is a company, but optional if the customer is a consumer.

Email
From the Email drop-down list box, select an email address that is associated with the customer, contact, or site.

Return Product Information

Displays information about the product being returned.

Return To IBU (return to inventory business unit)
Select the inventory business unit where the customer ships the returned material. In PeopleSoft Support, a default value for this field is specified for the call center business unit on the Call Center BU page. If PeopleSoft Inventory is installed, this is a PeopleSoft Inventory business unit.

RMA Type
Displays the type of processing that is used for the returned material. Values are:

Advanced Exchange: Immediately creates a replacement order for the item that the customer is returning. The replacement order can be for the same item or for a different item. You can specify the replacement in the Replacement Item(s) grid. The system populates the replacement item and requested quantity using the values defined for the return item and returned quantity.

Repair and Return: The customer is returning an item for repair.

Return and Replace: The item that the customer is returning must be received before a replacement order can be created.

Return to Stock: The customer is returning material that was originally requested on a case that was not needed.

Site
Displays the identification of the customer site from which material is being returned.

Serial ID
Displays the serial number or ship-serial number of the item that the customer is returning. If the item is serial-controlled, a serial number is required for the RMA. If necessary, a different serial number can be entered at the time of receipt. Ship-serial IDs are optional for ship-serial-controlled items.

Note. If a value is entered for an item that is not serial controlled or ship-serial controlled in your system, the value is removed when you save the information.

Product ID 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 Displays the identification of the item that the customer is returning.

Qty Returned Displays the amount of the item that the customer is returning. For serial-controlled items, this quantity must be *1*.

Requester Displays the ID of the person or entity that is associated with the requisition request. The system populates this value with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID, as necessary. If you have implemented PeopleSoft Purchasing, you can use the requester ID to view the status of all the requisitions that have been entered by a specific person using the Requisition Workbench.

We discuss this procedure in the documentation for reviewing requisition information.

PeopleSoft Purchasing PeopleBook.

Important! If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management under Structure Procurement Options.

Comments Enter notes about the RMA (optional).

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.

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 default value for this field is the current date.

Problem Code See Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Problem Codes for PeopleSoft Support Material Returns, page 43.

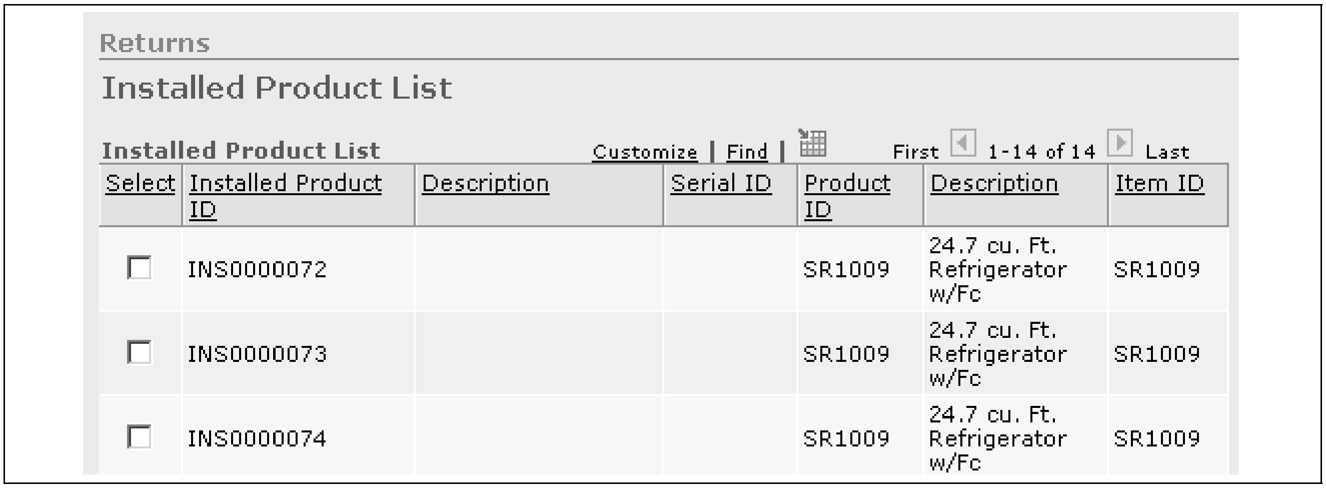
Address Displays the address associated with one of the ship-to addresses specified for the customer or customer site. When entering a new RMA, click the Override Address link to modify the address on the RMA Header Return From Address page. When viewing an existing RMA, click the Display Address link 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.

Selecting and Viewing Installed Product Records

Access the Installed Product List page.



Installed Product List page

This page lists all of the installed product records that matched the serial ID or product ID that you selected for the RMA.

Select the check box for the correct record and click Return. The system populates the fields for the RMA with the values from the row that you selected.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Tracking Installed Products”

Viewing the Installed Product Hierarchy

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Tracking Installed Products,” Viewing Installed Products.

Adding Notes

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

CHAPTER 13

Using Change Management

This chapter provides an overviews of accessing and managing change requests and discusses how to:

- Access new and existing change requests.
- Manage basic change request information.
- Manage tasks.
- Manage notes.
- Manage related changes.
- Manage related actions.
- Manage interested parties.
- View change request history.

See Also

Chapter 6, "Setting Up Change Management," page 77

Understanding Change Request Access

This section discusses the five ways to access change requests:

- Through the HelpDesk menu.

  Simply navigate to HelpDesk, Create a Change Request or HelpDesk, Search Change Requests.

  Note. If you want to create a new change request, a blank Change Request page appears. If you want to search for existing change requests, the configured search page for Change Management appears.

- From the HelpDesk case.

  From the HelpDesk case object, the Actions section of the case allows the user the ability to directly create a new change request. Creating the request for change from the case creates a direct linkage between the change request and the case. The change request can be viewed from the case, and the case can then be viewed from the change request.

- From the Quality Management Defect.

  Using Related Actions functionality, a new Change Request can be created directly from the defect. Also, an existing change request can be identified and linked to the defect. Linking will cause 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.

PeopleSoft 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 from navigating to Employee Self Service, HelpDesk, Create a Change Request.

Understanding Change Request Management

This section discusses:

- Change Request Main page.
- Tasks page.
- Notes page.
- Related Changes page.
- Related Actions page.
- Interested Parties page.

Change Request Main Page

You can access the Change Request Main page by using any of the five available methods. There are six distinct sections on the Change Request page:

- Requestor Information section.

  The user must enter a change request Requestor. This person can be selected from any available employee record. Values for the requestor's Department, Location, Manager's Name and Manager's Telephone fields will default 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. Values for these fields are configured—you set these values up by navigating to Set Up CRM, Product Related, Change Management.

  See Chapter 6, "Setting Up Change Management," page 77.

- Product Information section.This section allows you to link a particular product to a change request.

  Users may not link impacted product groups, products and assets to a change request, but will automatically link any affected parties to the Change Request. Affected parties can be viewed by clicking on the 'View Affected Parties' icon, located in the Product grid.

  Users can link impacted Product Groups or Installed Products to the Change Request via the lookup options here. They can further refine the impacted product by linking the specific asset tag of the item affected. A 'View Affected Parties" icon will apear when the selected installed product has specific employees linked to it. Clicking on this icon will display all of the linked employees.

- Change Control section.

  This section can be used to record more specific information about the change request. The Impact, Category, Release and Resolution fields are informational only.

The start dates and start and end times are not informational only—these duration fields are calculated fields. The 24/7 check box allows work to be scheduled beyond a normal Monday to Friday, 9 to 5 workweek.

Values that are entered in the Schedule sub-section also serve as a guide for the phase and task start and end dates. All phase and task dates, whether built manually in the Phase Summary section on the main page, or auto-populated from the Phase Model setup option, will not be allowed to start prior to the start date indicated in the Schedule sub-section in the Change Control section. The End Date field will automatically default to the last date on the last task when the Phase/Task model was either build 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. Tasks and the phases they are associated with can be viewed from the Tasks tab. Each phase in the Phase Summary section consists of a task or set of tasks that need to be completed in order for change to be successful. Any required approvals should also be presented in the form of an approval task.

  See Chapter 13, “Using Change Management,” Task Page, page 197.

  Phases can be built manually in this grid. Alternatively, phases and tasks can be automatically populated if users load a phase template.

  See Chapter 6, “Setting Up Change Management,” Setting Up Phase Templates, page 87.

  Any template can be loaded by choosing the appropriate template name in the Templatedrop down and clicking the Load button.

  If users click the Load button without first selecting a phase template from the Templatedrop down list box, all phase templates whose Type, Sub-Type and/or Priority fields that match the Type, Sub-Type and Priority fields of the change request, will appear. Users then select the desired phase template, thus populating the phases in the Phase Summary grid and tasks on the Task page. Phases can be manually built by clicking on the “Add Phase”.

- Audit History section.

  This section tracks the dates and times that the change request was created and modified.

Note. Upon opening the Change Request Main page, the Change Control, Phase Summary and Audit History sections will be collapsed by default.

See Chapter 13, “Using Change Management,” Accessing Change Requests, page 199.

Task Page

The Tasks page displays all tasks, process flow steps, and decision points that are associated with a Change Request. The Change Management application will carry the Task Id link to point into the Task Management application for the actual definition of the Task.

The Task Management application 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 auto added using the Phase Model or added manually.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Business Projects,” Managing Tasks

Notes Page

Notes pages will follow the standard Notes and Attachments format that us used throughout CRM Enterprise 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. In order to identify these common documents within a specific note, PeopleSoft provides a Note Type field.

Before adding an attachment to the note , the note type can be identified via the drop down. Values in the Note Type drop down list box are user configurable.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments”

Related Changes Page

The Related Changes Page provides the ability to link similar change requests in either a parent/child or a equal relationship.

Status updates cascade. 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 other Change Requests automatically. Cascading changes occur when a user manually changes the status, or an AAF rule executes unattended.

There are several conditions that must exist for cascading status changes to happen. First, the Change Request whose status is being changed must be related to another Change Request. Two characteristics define each relationship, a) the type and b) the hierarchical indication.

When Type is *Global*, and the hierarchy indicator is a parent of the change request whose status is changing, then a cascading status situation occurs. Further, if the status change is to a final type status (such as *Closed*, *Completed*, and *Rejected*) then any related Change Request with these two characteristics are displayed and offered to the user to allow the status to cascaded. This is for on-line manual status changes.

For an AAF rule execution status change, the status is cascaded automatically when the *Changed To* status is marked as a cascading type status (see Status setup for this indicator).

Related Actions Page

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 HelpDesk Case, those defects and cases can be linked directly to the Change Request.

Linking a defect or case to a change request allows the user to drill into these other objects directly from Change. It alos causes the change to be linked to the defect or case, and provide the ability to drill into the Change Request from either HelpDesk or Quality Management.

Conversely, change requests can be created and linked to defects from the Quality Management application and to Cases from HelpDesk. Linking from either of these two applications will also create the linkage in the Change application.

Linking cases and defects also causes status updates to be forwarded to the HelpDesk agent or the quality analyst. The type and frequency of the updates can be determined and configured using AAF.

You will not be able to create either a case or a defect from the Change Management application. Similarly, there is no cascading status functionality between cases, defects, and change requests.

Interested Parties Page

Interested parties— individuals not part of the change process via an assigned task or role—can receive notifications and updates on the Change status by inclusion on the Interested Parties page. Interested parties can be designated to receive updates only on specific phases, or on all phases.

Interested parties are limited to employees. The type and frequency of the updates can be determined and configured using AAF.

History Page

AAF events control the process flow of a change request. Whenever an event is processed on a change request, it will be audited and displayed on the History Events page.

Whenever a change is processed on a change request, it is audited and displayed on the History Audit page. The records to be audited are configurable in CRM Set Up. History interactions displays when email was used to notify an assigned worker of a task action or status change.

Accessing Change Requests

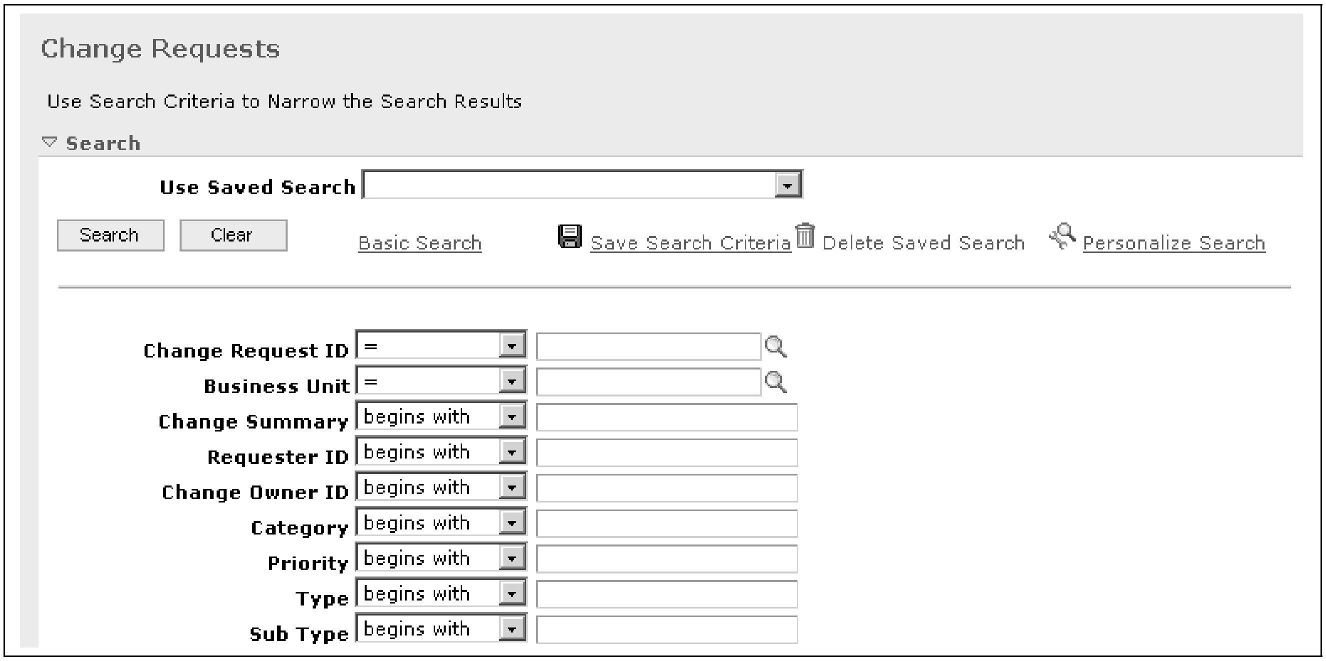
This section discusses how to add new change requests and access existing change requests:

Pages Used to Access Change Requests

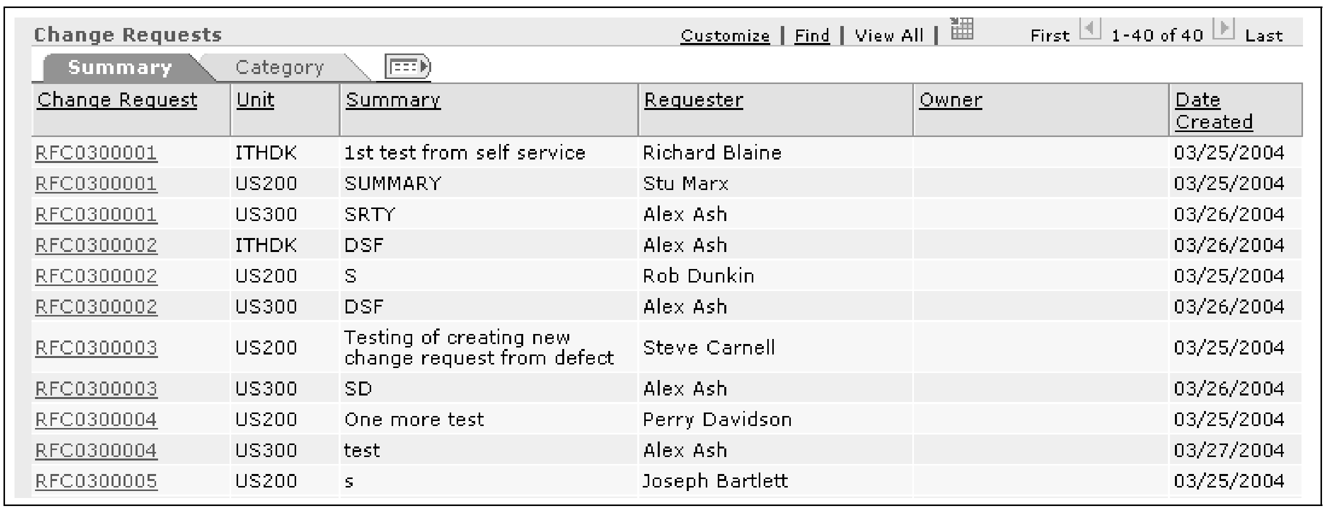
Page Name	Object Name	Navigation	Usage
Change Request Search page	RG_CHANGE_SRCH	• HelpDesk, Search Change Requests • Employee Self-Service, HelpDesk, Manage Change Requests	Access existing search requests.
Change Request	RG_CHANGE_REQUEST	• HelpDesk, Create a Change Request • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. • Employee Self-Service, HelpDesk, Create a Request	Add new change requests.

Accessing Existing Change Requests

Access the Change Request Search page.



Change Requests search page (1 of 2)



Change Request	Unit	Summary	Requester	Owner	Date Created
RFC0300001	ITHDK	1st test from self service	Richard Blaine		03/25/2004
RFC0300001	US200	SUMMARY	Stu Marx		03/25/2004
RFC0300001	US300	SRTY	Alex Ash		03/26/2004
RFC0300002	ITHDK	DSF	Alex Ash		03/26/2004
RFC0300002	US200	S	Rob Dunkin		03/25/2004
RFC0300002	US300	DSF	Alex Ash		03/26/2004
RFC0300003	US200	Testing of creating new change request from defect	Steve Carnell		03/25/2004
RFC0300003	US300	SD	Alex Ash		03/26/2004
RFC0300004	US200	One more test	Perry Davidson		03/25/2004
RFC0300004	US300	test	Alex Ash		03/27/2004
RFC0300005	US200	s	Joseph Bartlett		03/25/2004

Change Requests search page (2 of 2)

Note. The Search Criteria section is collapsed by default.

General Information on Change Request Searches

When searching for an existing change requests, you can search based on change request fields. Values for the change request fields are defined by your organization and are based on the business unit that you enter.

All search criteria fields correspond to fields on the Change Request page. However, on the Change Request page, you must enter valid values, whereas on the Change Request Search page, you can enter part of the whole value in most fields (depending on what operators are set for a given search field).

There are a few exceptions:

- You must enter a complete value in these fields: Change RequestID andBusiness Unit.

- You can enter partial values in the Requester ID and Change Control ID fields, but only after you click the lookup button associated with the field. The system displays the appropriate lookup page, where you can search for and select a customer or contact before attempting the search again.

Basic Versus Advanced Searches

Users can perform Boolean searches using field-level search criteria. The system administrator defines the operators that appear on the Configurable Search Setup page. Users can further refine the list of operators for each field if they are granted permission to personalize their search settings.

The system displays a list of the searchable fields. For each field, you can enter a search operator and the search text.

This table lists the search operators that are available for field-level searching. The operators that appear depend on whether the field being searched is a string or a number.

Operator	Description
<	The field value is less than the value that you enter.
<=	The field value is less than or equal to the value that you enter.
>	The field value is greater than the value that you enter.
>=	The field value is greater than or equal to the value that you enter.
=	The field value is equal to the value that you enter.
begins with	The field value matches the first characters of the value that you enter.
between	The field value is between the two values that you enter. You must enter two values. For example, suppose that you select *BETWEEN* and enter *100 and 200,* the search returns values from 100 to 200, inclusive.
in	You enter a comma-delimited series of values, and the system finds field values that match any one of the values that you entered.
is blank	The field value that you are asking the system to search is blank.
not	The field value is not equal to the value that you enter.

Note. PeopleSoft does not deliver the contains operator because it may cause performance problems. To add it to the list of available operators, use the Configurable Search Setup page.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages”.

Searches

Depending on how your implementation team configures the search pages for your system, you may not be able to view all of these fields.

Note. In Change Management, the Basic and Advanced Searches are identical. If the field that you are looking for does not appear, click the Personalize Search link. The system displays the Personalize Search Settings page (if the system administrator has made this page available to you). You can use this page to select additional fields to display on the search page. If you still do not see the field that you are looking for, contact your system administrator.

Use Saved Search Provides access to all saved searches.

Basic Search Click to display a list of fields from which you can search or add new change requests.

Advanced Search Click to display a list of fields from which you can search or add new change requests.

Save Search Criteria Click to save the current search criteria as a saved search (either as a new saved search or as a modification to an existing saved search). Then enter the name of the saved search in the Save Search As field and click Save Search.

Delete Saved Search Click to delete a saved search. Then select the name of the search that you want to delete and click Delete.

Personalize Search Click to configure the search page to your own personal preferences.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages,” Personalizing the Search Page.

Search Criteria Fields for PeopleSoft Change Management

Change Request ID Is a unique number that can be automatically determined using auto numbering functionality

Business Unit Enter a business unit. Your can set up your user preferences determine the default business unit that appears when you open the Change Requests Search page.

When you create a new change request, the business unit that you specify on the Change Request Search page does not limit which employees are included in the search domain.

When you create a new change request, the business unit that you specify on the Change Request Search page becomes the business unit for the change requests.

Change Summary Enter the name of a worker or employee who is experiencing the problem.

Requester ID Enter the the name of the person who is requesting the change.

Change OwnerID Enter the the name of the person who owns the change request.

Category Enter the category of the change request.

Priority Enter the priority of the change request.

Type Enter the type of the change request.

Sub Type Enter the sub type of the change request.

Note. 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.

Search Commands

Search Click this button (or press ALT + S) to perform a search. The system searches for all possible matches and displays the results in the Search Results grid.

Clear Click this button (or press ALT + C) to clear data from the search criteria fields.

Search Strategies

Here are some search tips:

- You can enter partial values in any field except Change Request ID and Business Unit.

  For example, if you select *begins with* as the operator and then enter *Smi* in the Name field, the search results include a list of all people whose last names start with *Smi*.

- You can enter the least amount of data that is needed to limit the search results.

  Entering extra information is time-consuming and increases the likelihood of a typographical error that prevents the system from finding any information.

- A change request ID uniquely identifies a change request; searching for existing change requests by change request ID displays the desired Change Request page (this involves the fewest keystrokes).
- The search is not case-sensitive.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Defining Change Management Preferences

Managing Basic Change Request Information

This section discusses how to:

- Manage basic change request information.
- Manage tasks.

Page Used to Manage Basic Change Request Information

Page Name	Object Name	Navigation	Usage
Change Request	RG_CHANGE_REQUEST	• HelpDesk, Create a Change Request • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. • Employee Self-Service, HelpDesk, Create a Request	Add new change requests.

Managing Tasks

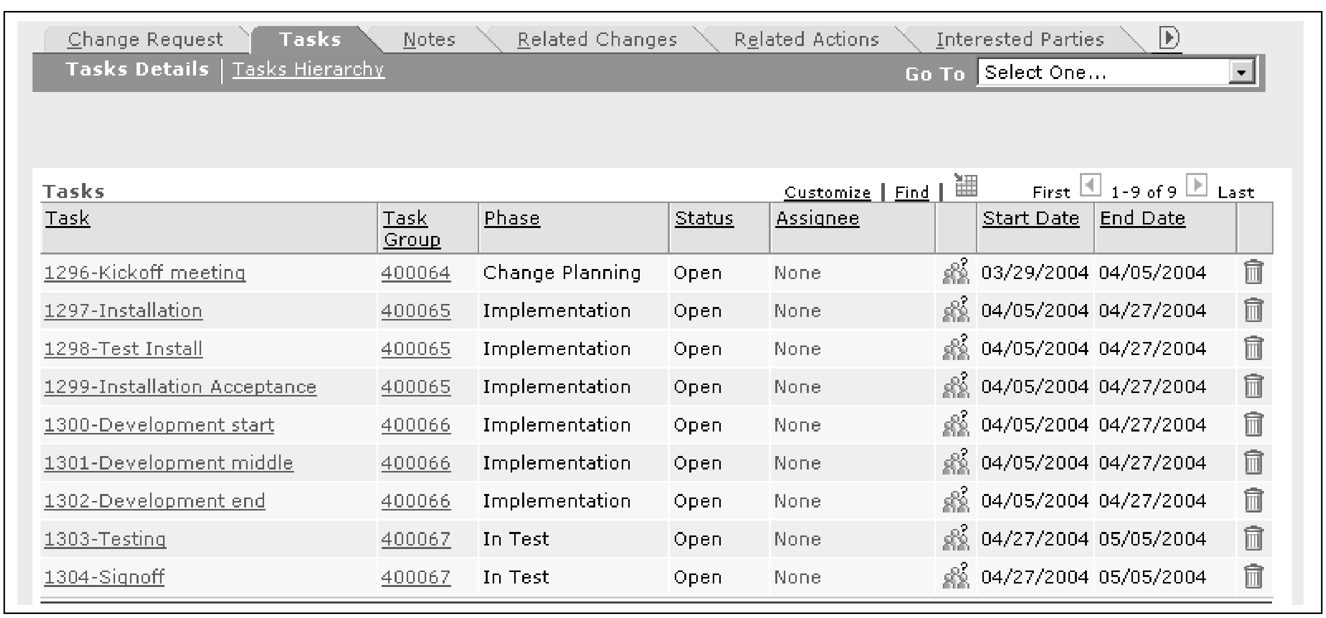
This section discusses how to manage tasks.

Pages Used to Manage Tasks in Change Management

Page Name	Object Name	Navigation	Usage
Tasks	RG_CHG_TASKS	• HelpDesk, Create a Change Request, Tasks • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Tasks page. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Tasks page. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. Then, select the Tasks page. • Employee Self-Service, HelpDesk, Create a Request, Tasks	Manage tasks in Change Management.

Managing Tasks in Change Management

Access the Tasks page.



Tasks page

Managing Notes

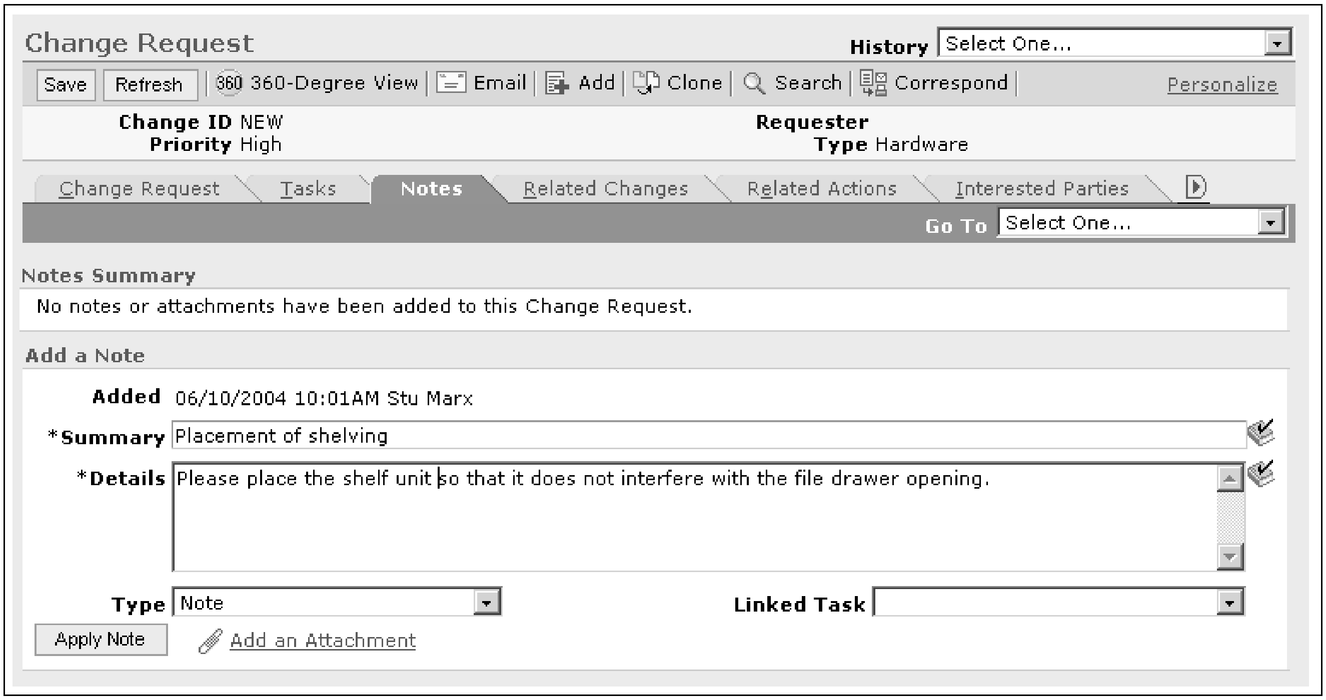
This section describes how to utilize notes in Change Management.

Pages Used to Manage Notes in Change Management

Page Name	Object Name	Navigation	Usage
Tasks	RG_CHANGE_NOTE	• HelpDesk, Create a Change Request, Notes • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Notes page. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Notes page. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. Then, select the Notes page. • Employee Self-Service, HelpDesk, Create a Request, Notes	Add notes and/or attachments to change requests.

Managing Notes in Change Management

Access the Notes page:



Notes page

Managing Related Changes

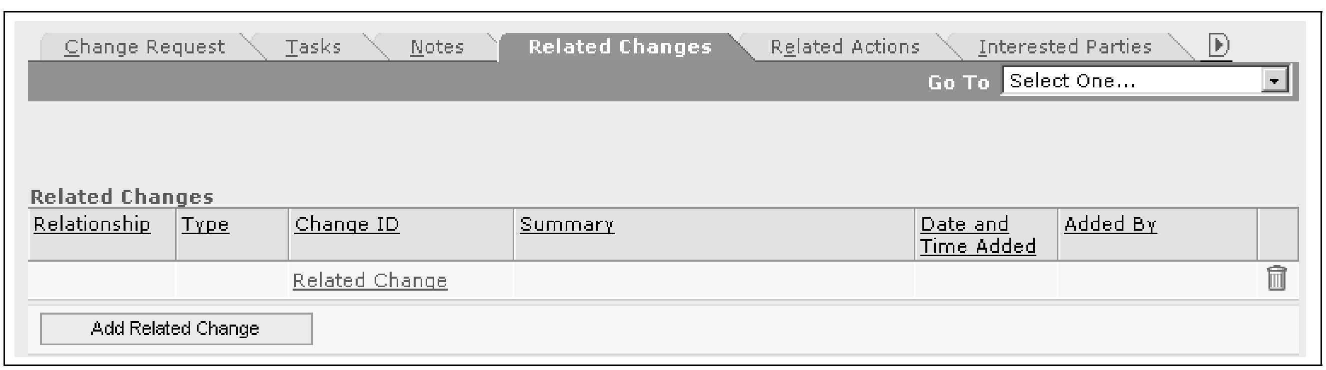
This section discusses how to manage related changes.

Pages Used to Manage Related Changes in Change Management

Page Name	Object Name	Navigation	Usage
Related Changes	RG_REL_CHANGES	• HelpDesk, Create a Change Request, Related Changes • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Related Changes page. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Related Changes page. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. Then, select the Related Changes page. • Employee Self-Service, HelpDesk, Create a Change Request, Related Changes	Relate your change request to another change request.

Managing Related Changes in Change Management

Access the Related Changes page:



Related Changes page

Managing Related Actions

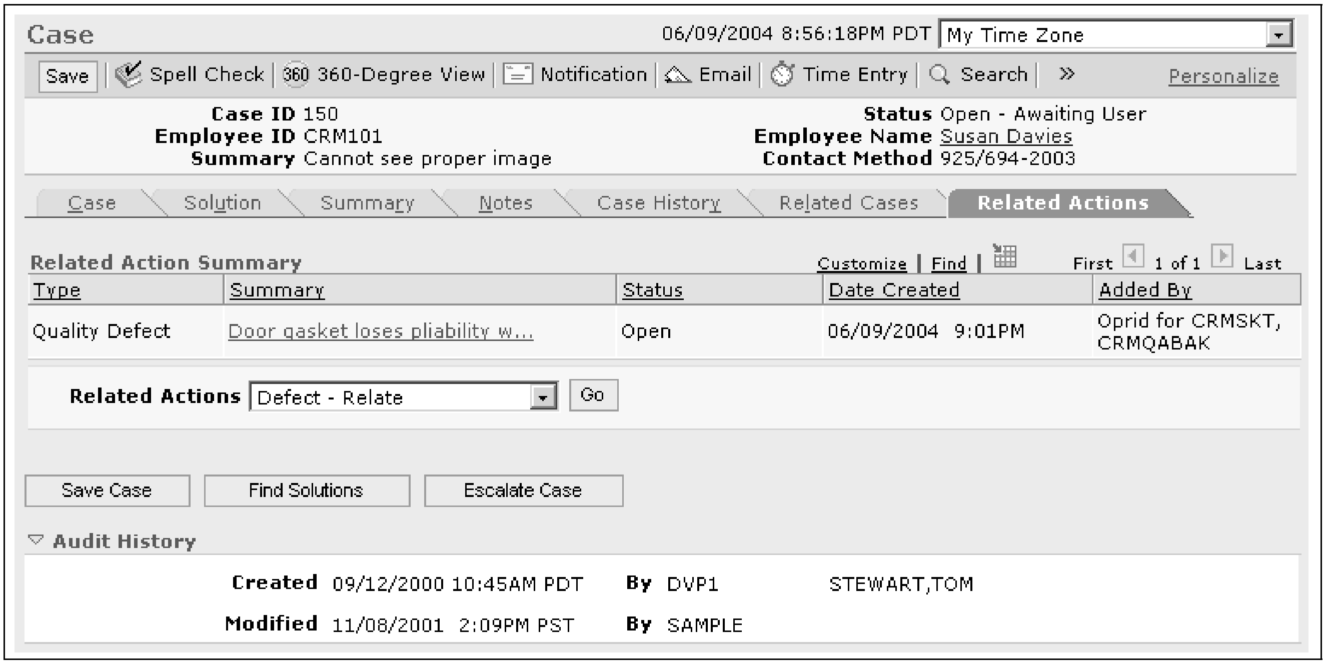
This section describes the Related Actions page.

Pages Used to Manage Related Actions in Change Management

Page Name	Object Name	Navigation	Usage
Related Actions	RG_REL_OBJECTS	• HelpDesk, Create a Change Request, Related Actions • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Related Actions page. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Related Changes page. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. Then, select the Related Changes page. • Employee Self-Service, HelpDesk, Create a Request, Related Actions	Relate actions to the change request.

Managing Related Actions in Change Management

Access the Related Actions page:



Related Actions page

Managing Interested Parties

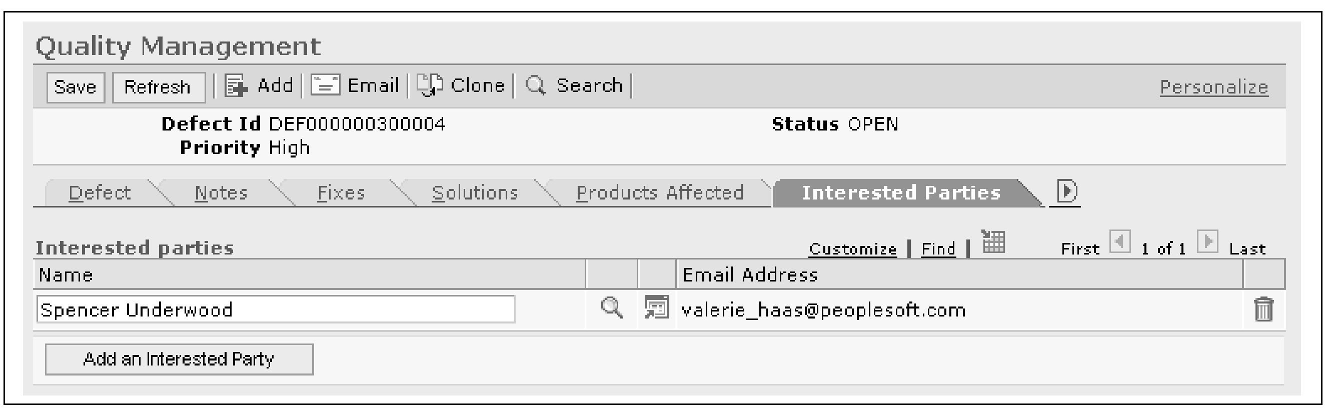
This section discusses how to manage interested parties for a case.

Pages Used to Manage Interested Parties in Change Management

Page Name	Object Name	Navigation	Usage
Related Actions	RG_CHG_INT_PARTY	• HelpDesk, Create a Change Request, Interested Parties • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Interested Partiess page. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the Interested Parties page. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. Then, select the Interested Parties page. • Employee Self-Service, HelpDesk, Create a Request, Interested Parties	Manage interested parties to a change request.

Managing Interested Parties in Change Management

Access the Interested Parties page.



Interested Parties page

Reviewing Change Request History

This section provides an overview of change request history and explains how to:

- View the event history of a change request.
- View the audit trail for a change request.

Understanding Change Request History

The Change Request History page includes an Events subpage and an Audit subpage:

- Change request history provides a summary of the major events in the lifecycle 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 up 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 Active Analytics Framework.

  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 Active Analytics Framework (including service-level workflow).

  The system triggers a workflow action under conditions that you define. The event processing definition includes a check box that you select if you want to create change request history when the workflow is triggered.

- Manual notifications.

  The system adds change request history whenever a user sends a manual notification from the change request.

  See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Sending Manual Notifications”.

Audit History Page

This page displays record-level changes to change request data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). However, there is no conditional logic to evaluate the before and after values of the field; the system captures all audited actions regardless of the field value.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up Auditing for Cases and Inbound Email”

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework”

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Interactions”

Prerequisite

Your organization must define event sets that tell the system which events to capture in the change request history.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Working with Active Analytics Framework,” Configuring Case History Actions.

Pages Used to Review Change Request History

Page Name	Object Name	Navigation	Usage
History	RG_CHG_HISTORY	• HelpDesk, Create a Change Request, History • HelpDesk, Create a Case Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the History page. • HelpDesk, Search Cases Select Change Request from the Related Actions drop down list box in the Actions section. Then, select the History page. • Quality Management, Search Defect Select Change Request from the Type drop down list box in the Related Actions section. Then, select the History page. • Employee Self-Service, HelpDesk, Create a Request, History	View a summary of important events in the life cycle of a change request.
Audit Trail	RG_CHG_HISTORY	Click the Audit link on the Change Request History page.	View detailed information about changes to specific fields in the change request.

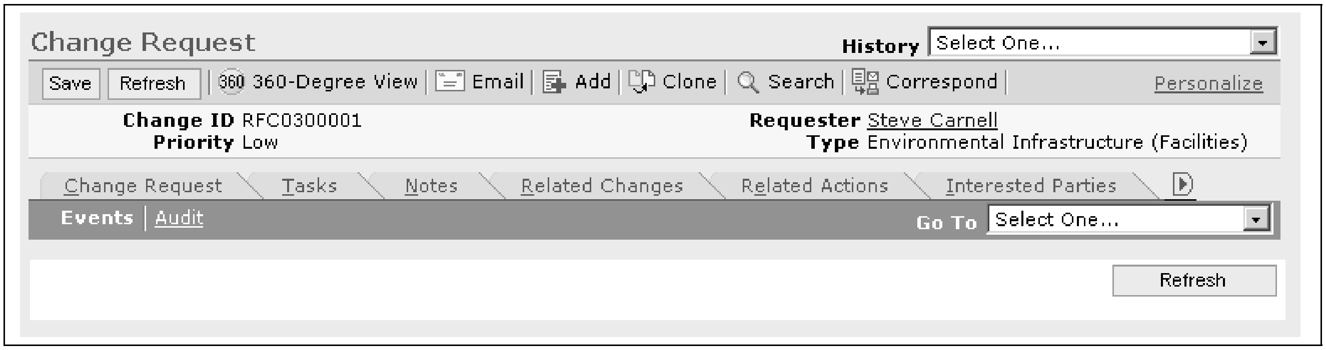
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up Auditing for Cases and Inbound Email”

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Configuring Case History Actions

Viewing the Event History of a Change Request

Access the change request History page.



History: Events page

Audit

Click to display the Audit History page.

Events button

If the entry was created by change history Active Analytics Framework, click the Events button to view details about the event. When you click this button, the system displays the appropriate page as determined by the event processing rules. For example, if the event is the addition of a new note, clicking the button displays the Notes and Attachments page. When the history item is from a notification, clicking the button takes you to that notification.

This button does not appear for entries that were created through a mechanism other than case history Active Analytics Framework.

Date

The date that this action occurred.

Action Taken

The system populates this field with the description of the action from the Event Definition page.

Details

Describes the details of the action that was taken. For example, if a note was added, the system shows the first 30 characters (configurable). Or, if an agent adds an attachment to the change request, the system shows the name of the attachment.

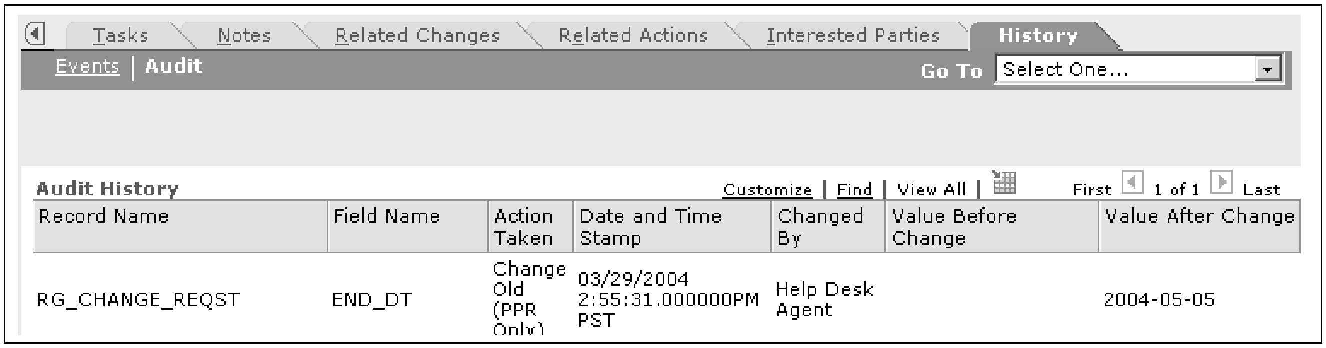
If a field value changes, the system could display the values before and after the change in the Details column. You must, however, use the History Event Handler page to configure both the field value changes and the information that appears in the Details column. To configure other events that you want to show up on the Change Request History page, use the History Event Handler page.

Visibility

The system displays either *All* or *Internal* to indicate who can view the details of the event.

Viewing the Audit Trail for a Change Request

Access the Change Management History page. Click the Audit link.



Change Management History: Audit page

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). 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.

PART 3

Self-Service Applications

CHAPTER 14

Configuring Self-Service Applications

This chapter provides an overview of PeopleSoft call center's self-service application configuration and discusses how to:

- Configure the Contact Me Regarding This Problem notifications.
- Associate solutions with reasons for closing cases.
- Configure troubleshooting guide and frequently asked question (FAQ) solution libraries.
- Update search descriptions.
- Associate solutions with reasons for closing cases.

See Also

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 9

Understanding Self-Service Application Configuration

This section discusses:

- Self-service application configuration.
- Contact Me notifications.
- Live chat.
- Association of solutions with case closure reasons.
- Search descriptions for predefined searches.
- Troubleshooting guide and FAQ configuration.

Self-Service Application Configuration

Central to the addition of enhanced self-service configurability options are display templates. When they are 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 and fields, and they can adjust field labels.

See Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Prompt Tables for Cases, page 33.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 9.

RC_SUPPORT Display Template

The RC_SUPPORT display template controls the following 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 Display Template

The RC_HELPDESK display template controls the following PeopleSoft 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)

CRM_HHD Display Template

The CRM_HHD display template controls the following PeopleSoft HelpDesk for Human Resources 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 Active Analytics Framework objects (events, event handlers, and email templates) to support this process.

The delivered Active Analytics Framework objects send notifications to the assignee (agent or provider group), or for unassigned cases, to the provider group specified on the Case Defaults page as the Contact Me Provider Group. Separate events for email and worklist notifications enable the system to send notifications using the recipient's preferred notification method.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Live Chat

In this release, 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 quickly by delivering targeted and real-time service. When a chat request is received, the system uses NLP (Natural Language Processing) to provide the individual with suggested solutions from the FAQ database, automatically. This capability enables customers to find answers to their questions and frees agents to focus on complex issues.

See *PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook*, “Working with Chat in PeopleSoft CRM”.

Association of Solutions with Case Closure Reasons

Closed cases must be associated with either:

- A solvable action.

  You mark an action as *solvable* on the link definitions page.

- 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.

See Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” page 53.

See Chapter 2, “Defining Call Center Business Units and Display Template Options,” page 9.

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.

There are two types of case closure reasons:

- A predefined reason (as established in the Reason Code page).

  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 self-service application description becomes the solution summary.

- A free-form text reason.

  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.

Note. Multiple solutions can solve the case.

See Also

Chapter 9, “Processing Cases,” page 139

Chapter 14, “Configuring Self-Service Applications,” Associating Solutions with Reasons for Closing Cases, page 225

Chapter 5, “Setting Up Links to PeopleSoft HRMS Pages and Related Actions,” page 53

Chapter 3, “Setting Up Call Center Prompt Tables,” page 29

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, “Setting Up Solution Management”

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, “Managing Solutions”

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:

- The person or company for whom the case was created.
  - In support cases that are created 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.
  - In support cases that are created for consumers, this is the consumer.
  - In PeopleSoft HelpDesk and PeopleSoft HelpDesk for HR cases, this is the employee.
- The case contact.
  - In support cases that are created for companies, this person is identified in the Contact field as the contact for the case in question.
  - In support cases that are created for consumers, this can be the consumer or another person.

    Because support cases require contact information, consumers acting on their own behalf are entered in both the Customer field and the Contact field.
  - In PeopleSoft HelpDesk, this is the alternative contact.

    Not all helpdesk cases have an alternative contact. Employees acting on their own behalf are *not* considered alternative contacts.

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 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 search on keywords, 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 view all of the company's cases, including cases for which they are not the contact.
  - In PeopleSoft Support, consumers 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 view all of the cases that are reported on their behalf (regardless of the contact) and all of the cases for which they are alternate contacts (regardless of who the case was reported for).

    The delivered name for this search is *all my cases.*

- *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, but only those for which the user is the contact.
  - In PeopleSoft Support, consumers 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 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.

This table lists the eight predefined searches based on these two search types. When you configure descriptions for the searches, you set up different descriptions for each delivered role type: contact, consumer, broker, and employee.

Search Code	Description
COALL	All cases.
COL30	All cases reported in the last 30 days.
COL7D	All cases reported in the last 7 days.
COOPN	All cases that are still open.
MEALL	Cases for which I am the contact.
MEL30	Cases for which I am the contact and that were reported in the last 30 days.

Search Code	Description
MEL7D	Cases for which I am the contact and that were reported in the last 7 days.
MEOPN	Cases for which I am the contact and that are still open.

Note. If you add additional role types that apply to self-service application users, you must set up corresponding predefined searches. The system does not do this for you.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, "Defining Control Values for Business Objects," Defining Role Types and Role Categories

Troubleshooting Guide and FAQ Configuration

PeopleSoft Support, HelpDesk self-service application users have direct access to solutions and troubleshooting guides that are associated with certain solution libraries.

Note. Troubleshooting guides and FAQs are used in PeopleSoft Support and PeopleSoft HelpDesk, and PeopleSoft HelpDesk for HR.

Troubleshooting Guides

To make a troubleshooting guide script available to self-service application users, associate it with a solution library. Solution libraries can be associated 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.

See Also

Chapter 15, "Working with Self-Service Application Transactions," Accessing FAQs, page 250

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, "Defining Control Values for Business Objects," Defining Role Types and Role Categories

Chapter 15, "Working with Self-Service Application Transactions," Selecting and Running Troubleshooting Guides, page 252

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, "Setting Up Solution Management"

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, "Managing Solutions"

Configuring Contact Me Regarding This Problem Notifications

This section discusses how to configure notifications that are triggered after users click the Contact Me Regarding This Problem button on self-service application pages.

Note. The Contact Me Regarding This Problem button is specific to call center self-service application pages; it is different from the Contact Us page that customers use to submit general-purpose questions and feedback to your organization.

To configure notifications for the Contact Me Regarding This Problem button:

1. If you do not want to use the delivered email template for your email notifications, create a new email template.
2. If you do not use the delivered event handlers, set up event handlers for the four events that capture the use of the Contact Me Regarding This Problem button.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Customer Self-Service Transactions," Sending Contact Us Messages

Associating Solutions with Reasons for Closing Cases

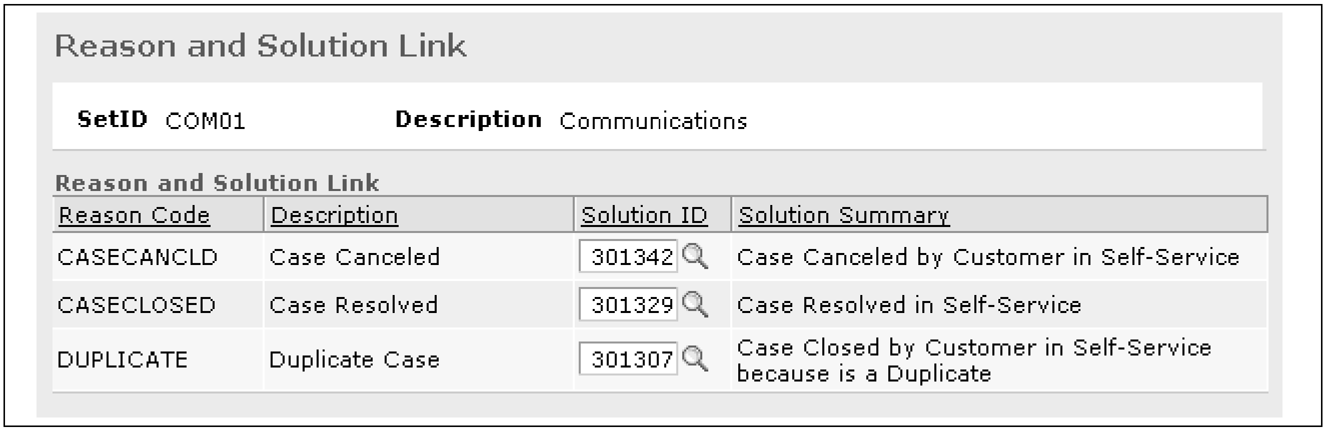
This section discusses how to associate solutions with reasons for closing cases.

Page Used to Associate Solutions with Reasons for Closing Cases

Page Name	Object Name	Navigation	Usage
Reason and Solution Link	RC_REASON_SOLN	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Reason and Solution Link	Identify the solutions that are to be used as the successful resolution for cases that users close through self-service applications.

Identifying Solutions

Access the Reason and Solution Link page.



Reason and Solution Link

SetID COM01 Description Communications

Reason and Solution Link

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

Reason and Solution Link page

Reason Code

Lists all reasons of the type *Reason Closed* that you have set up for this setID. These are the reasons that a self-service application user can select when closing a case.

Solution ID

Enter the solution that represents this reason. 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 the status: *Successful Resolution.*

If a reason does not have an associated solution, then the first time that a self-service application user closes a case with that reason, the system creates a *Canned* solution and associates it with that reason. The next time that reason is used, the solution that was previously created is used.

Updating Search Descriptions

This section discusses how to update predefined search descriptions.

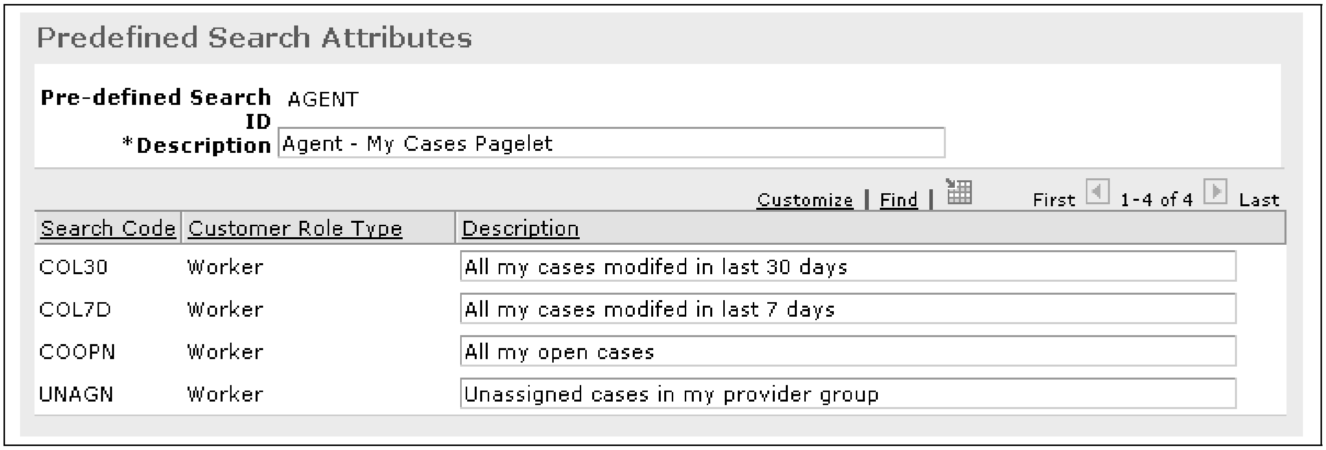
Page Used to Update Search Descriptions

Page Name	Object Name	Navigation	Usage
Predefined Search Attributes	RC_DEFINED_SRCH	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Predefined Search Attributes	Update predefined search descriptions.

Updating Predefined Search Descriptions

Access the Predefined Search Attributes page.

For each search code and customer role type combination, review the search description and modify it as needed.



Predefined Search Attributes page

Configuring Troubleshooting Guide

This section discusses how to:

- Configure a troubleshooting guide solution library.
- Configure an FAQ solution library.

Pages Used to Configure Troubleshooting Guides

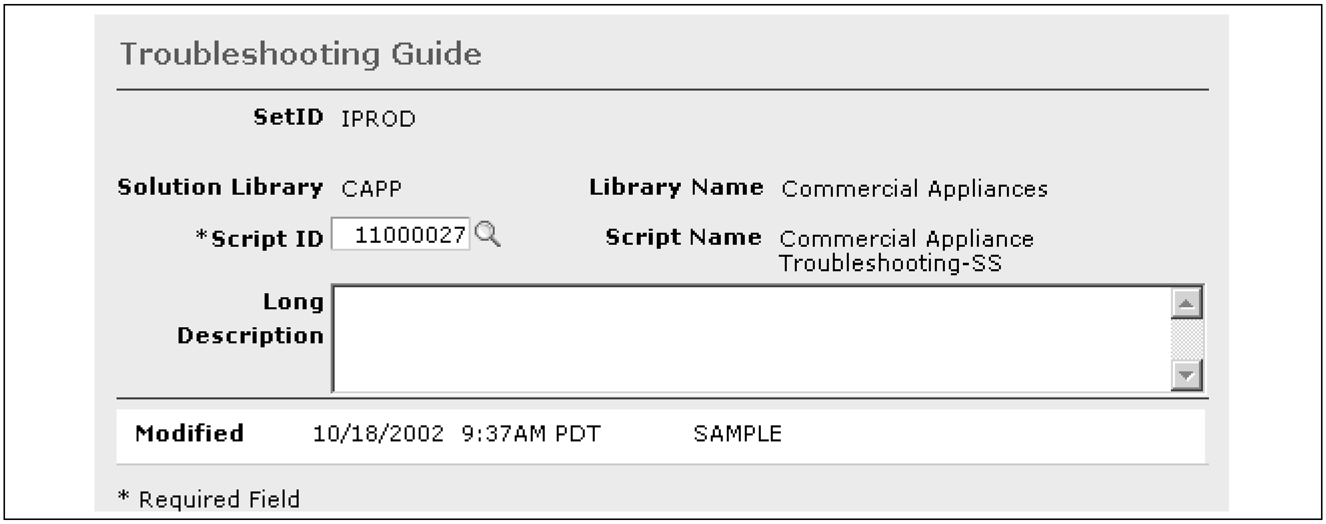
Page Name	Object Name	Navigation	Usage
Troubleshooting Guide	RBT_TGUIDE_SETUP	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Troubleshooting Guide Setup, Troubleshooting Guide	Identify troubleshooting guide scripts that customers can access through self-service applications.
Solution Library Setup	RC_SOLN_LIB_SETUP	Set Up CRM, Product Related, Solution, Solution Library, Solution Library Setup	Create solution libraries.

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, “Setting Up Solution Management,” Solution Libraries

Configuring a Troubleshooting Guide Solution Library

Access the Troubleshooting Guide page.



Troubleshooting Guide page

Script ID

Enter 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 in the Customer Care - Troubleshooting Guide page.

CHAPTER 15

Working with Self-Service Application Transactions

This chapter provides an overview of self-service application transactions and discusses how to:

- Access self-service application transactions.
- Create a case.
- Manage existing cases.
- Search for solutions.
- Access frequently asked questions (FAQ).
- Select and run troubleshooting guides.
- Run scripts in self-service.

Understanding Self-Service Transactions

PeopleSoft Customer Relationship Management (PeopleSoft CRM) call center applications enable you to deploy self-service transactions that callers can use to enter and view their own cases. These transactions provide limited access to case information and employ a simple interface that is suited to the casual, untrained user.

This section discusses:

- Self-service transactions.
- Configurable functionality.
- Self-service interface elements.
- Self-service data access.
- Solution tracking in self-service.
- Confirmation pages.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Customer Self-Service Transactions"

Self-Service Transactions

The following transactions are available to PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources self-service users:

- Search for solutions outside the context of a case.
- Create a new case.
- Manage cases: search for, review, and update existing cases.
- Use FAQ: access solutions that belong to the solution library with a specific FAQ configuration.
- Use Troubleshooting guide: access and run troubleshooting guide scripts that have been associated with solution libraries.

Configurable Functionality

Within the transactions that are used to create and manage cases, certain functionality depends on the system configuration.

Business Unit Configuration

The availability of the following functionality depends on the settings on the Business Unit - Options page:

- Close a case.

  The Close Case button is available for cases that have not been resolved and have no corresponding resolution with the status *Successful Resolution.* The button's availability depends not on the case status, but on the resolution status.

  When a self-service user clicks this button and provides a reason for closing the case, the system adds a successful resolution to the case and updates the status based on the closed case status that you select on the Case Defaults page. (If you do not enter a closed case status or if you enter a status with a type other than *Closed,* then the case is not closed, but only resolved).

- Reopen a case.

  The Reopen Case button is available for cases that have been resolved—that is, there is a resolution with the status *Successful Resolution.* The button's availability depends not on the case status, but on the resolution status.

  When a self-service user clicks the Reopen Case button and provides a reason for reopening the case, the system changes the status of the successful resolution to *Resolution Failed* and updates the status based on the reopened case status that you select on the Case Defaults page. (If you do not enter a reopened case status, the status does not change.) If your organization has not set a reopened case status, the status doesn't change. This could result in cases having a closed status without having a successful resolution—a condition that the system normally does not allow.

  Users can reopen cases only during the grace period that is established by your organization—the grace period lasts for a specified number of days after the case has been resolved.

Active Analytics Framework Notifications

Active Analytics Framework handles notifications related to activity that is in the self-service pages. PeopleSoft delivers Active Analytics Framework that:

- Sends a notification when a new case is submitted.
- Sends a notification when a user clicks the Contact Me Regarding This Case button.

Both notifications are sent to the agent or provider group who is assigned to the new case. For Contact Me notifications, if the case is unassigned, the notification goes to the provider group that is identified on the Case Defaults page as the Contact Me Provider Group.

Self-Service Workflow

PeopleSoft has built the following event handlers and workflow actions into its self-service applications for both PeopleSoft HelpDesk and PeopleSoft Support:

- 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 user clicks the Contact Me Regarding This Problem button for a case that is assigned to an agent whose notification preference is email or both, the system sends an email to the case owner.
- When a user clicks the Contact Me Regarding This Problem button for a case that is assigned to an agent whose notification preference is worklist or both, the system sends the case to the case owner's list.
- 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).
- 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.

Field Value Configuration

When you set up prompt tables for certain case fields, you can enter self-service versions of the field values.

See Also

Chapter 14, "Configuring Self-Service Applications," page 219

Chapter 2, "Defining Call Center Business Units and Display Template Options," page 9

Chapter 3, "Setting Up Call Center Prompt Tables," page 29

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Self-Service Data Access

The fields and data that appear in the self-service transactions vary depending on the configuration and on the data itself.

Field Visibility

Implementers can control the visibility of fields and the appearance of field labels by modifying the display template.

See Chapter 14, "Configuring Self-Service Applications," page 219.

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 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.

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.

See Also

Chapter 14, "Configuring Self-Service Applications," page 219

Chapter 3, "Setting Up Call Center Prompt Tables," page 29

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Notes and Attachments"

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Solution Tracking in Self-Service

Users can search for solutions from self-service applications by clicking the Search for Solutions button. The self-service application Solution page has three tabs:

- Suggested Solutions

  You will have access to this tab only if you have purchased NLP (a natural language processing application).

- Keyword Search

  This is similar to how the keyword searches work in agent-facing call center applications. There is a *Basic* and an *Advanced* search. The Advanced Search in self-service applications contain limited options, as shown in the screenshot below. The more advanced options of searching over particular domains is reserved for agent-facing case solution searches.

- Frequently Used

  This is similar to how the frequently used solutions work in agent-facing call center applications.

See *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook*, "Setting Up Solution Management".

Note. Multiple solutions can solve the case.

When viewing solutions in self-service, users are asked whether the solution solved the problem.

Searching From Within a Case

If the user is searching from within a case, the possible responses are *YES* and *NO*.
When the user selects a response, the system:

- Updates the resolution status if the user originally accessed a solution that was already associated with the case.

The resolution status refers to the status of the solution in the context of a case. This is different from the solution status, which is independent of any case.

- Associates the solution with the case and sets the initial resolution status if the user accessed the solution using Solution Advisor.

If you click on a solution to open the Solution Details page, you have the option to select *No, Continue Search*or *I'll try it later.*

The resolution status is set as follows:

- Answering *YES* sets the status to *Successful Resolution.*

  If you've established a default case status for resolved cases on the Case Defaults page, then *Yes* also updates the case status.

- Answering *No* or *No, Continue Search*sets the status to *Failed Resolution.*
- Answering *I'll try it Later* sets the status to *Waiting on Customer.*

Searching Outside the Context of a Case

If the user is searching outside the context of a case, the possible responses are *YES* and *NO.*

Solution usage outside the context of a case does not affect the solution usage counts. However, the system records the attempt internally in the RC_SOLN_ATMT_SS table. This information is not visible through the PeopleSoft Internet Architecture, but it is available for reporting and analysis.

See Also

Chapter 9, "Processing Cases," page 139

Confirmation Pages

When self-service users perform certain actions, the system provides confirmation to assure the user that the transaction was successful.

The confirmation page have different form depending on the application.

- Delivered, PeopleSoft Support has red confirmation text appears at the top of the page where the user performed the action.
- Delivered, PeopleSoft HelpDesk has a separate confirmation page appears; the user must click a button or link before continuing.

Note. The appearance of configuration pages can be conmtrolled by modifying display templates.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook,* "Configuring Display Templates," Configuring Display Templates for Components.

The following actions trigger confirmation messages:

User Action	PeopleSoft HelpDesk Confirmation Page	Description
Submit a new case without searching for solutions (click the Submit button, not the Submit and Search Solutions button).	Submit Confirmation page (RC_CASE_HD_SS_CONF)	Confirms that the user submitted the case and gives the user the new case number.
Close or reopen a case.	Submit Confirmation page (RC_CASE_HD_SS_SUBT)	Confirms that the case is successfully closed or reopened.
Click the Contact Me Regarding this Problem button.	Submit Confirmation page (RC_CASE_SS_CONTACT)	Confirms that the user's request to be contacted is sent.
Submit a new note or new contact information.	Save Confirmation page (RC_CASE_SS_SAVE)	Confirms that the transaction is recorded.
Answer *Yes* when asked whether a solution resolved the user's problem (when viewing a solution in the context of a case).	Close Case page (RC_CASE_SS_ CLOSE)	Confirms that the solution is successful and the case is closed.

Accessing Self-Service Transactions

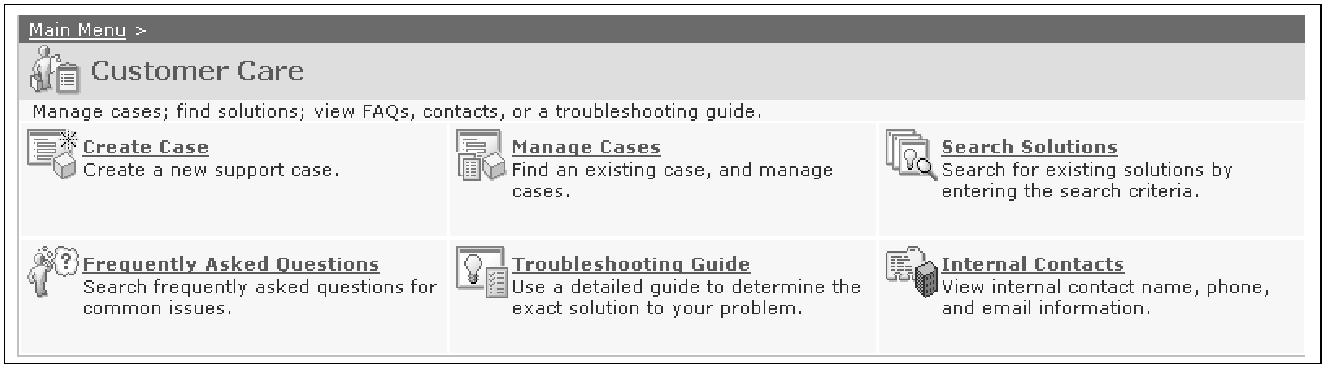
This section discusses how to access self-service transactions.

Pages Used to Access Self-Service Transactions

Page Name	Object Name	Navigation	Usage
Customer Care	RC_MNU_CASE	Customer Care (PeopleSoft Support only)	Select a PeopleSoft Support self-service application transaction.
HelpDesk	RC_MNU_ITHD	Employee Self Service, HelpDesk	Select a PeopleSoft HelpDesk self-service application transaction.
Human Resources HelpDesk	RC_MNU_HRHD	Employee Self Service, HR HelpDesk	Select a PeopleSoft HR HelpDesk self-service application transaction.

Accessing Self-Service Transactions

Access the Customer Care welcome page.



Customer Care

Click the links on this page to access self-service transactions.

Note. The welcome pages for the PeopleSoft HelpDesk applications are the same as the Customer Care welcome page.

Creating a Case

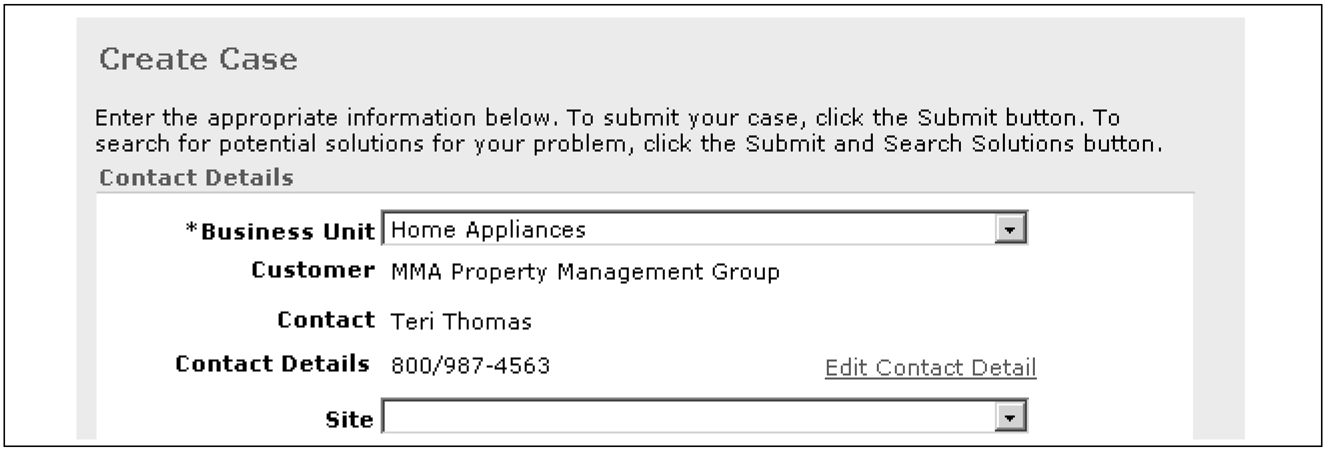
This section discusses how to create a case.

Pages Used to Create a Case

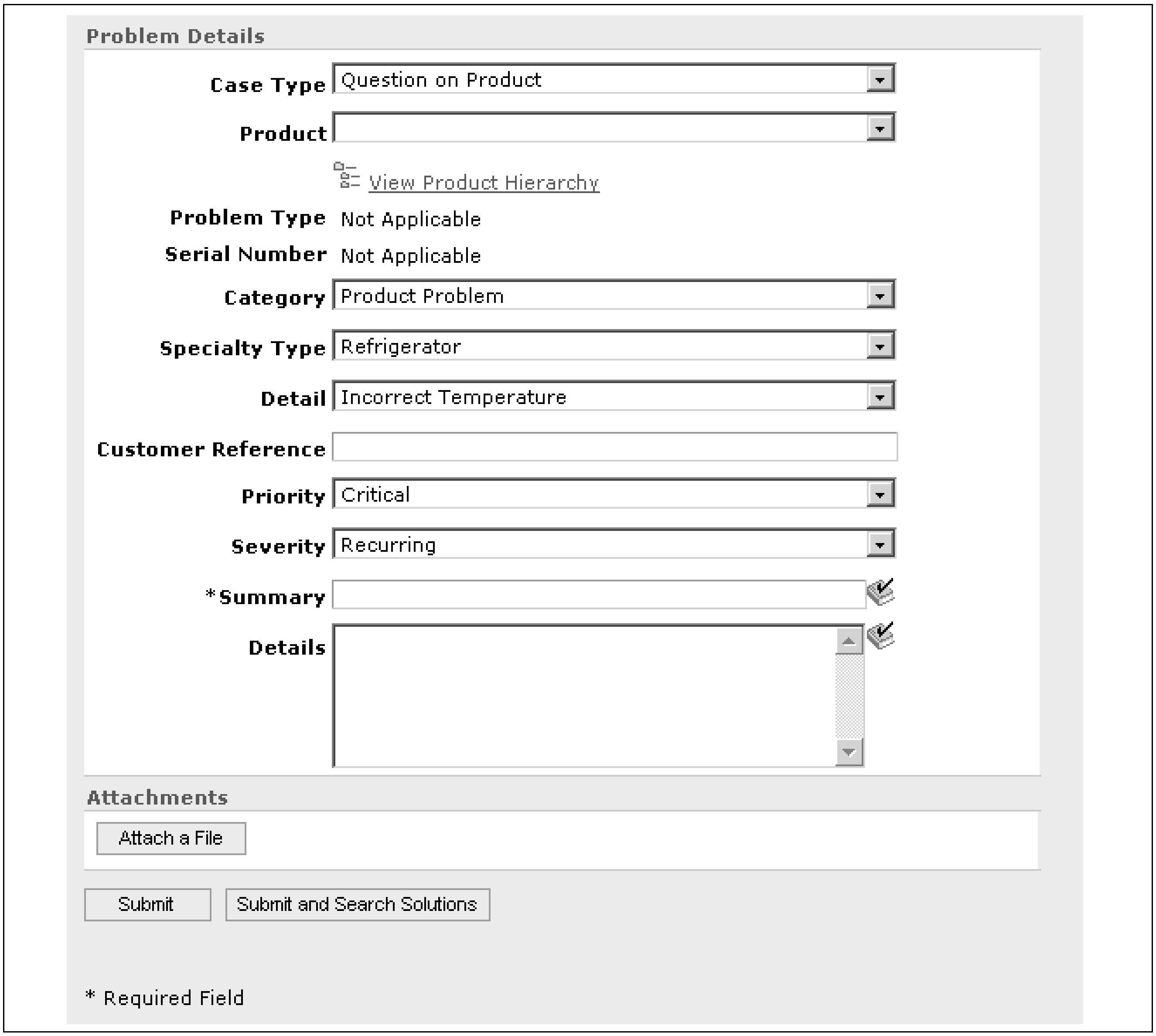
Page Name	Object Name	Navigation	Usage
Create Case	RC_CASE_SW_SS_RPT	• On the Customer Care welcome page, click the Create a Case link. • In the portal navigation menu, click Create Case.	Describe and submit a new problem.
Create Case	RC_CASE_HD_SS_RPT	• Employee Self Service, Create Case • Employee Self Service, Create HR Case	Describe and submit a new problem.

Creating a Case

Access the Create Case page.



Create Case (1 of 2)



Create Case (2 of 2)

The visibility of page elements depends on how you have configured the display template for this component. Also, some fields can be assigned default values based on business unit settings. The system enters default values even if the fields are hidden.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates," Configuring Display Templates for Components.

See Chapter 2, "Defining Call Center Business Units and Display Template Options," page 9.

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.

Customer

This read-only field displays the name of the customer — it can be the name of the company, where the self-service application user works.

Contact

This read-only field displays the name of the contact that represents the company.

Contact Details

This read-only field displays the contacts primary contact method.

Edit Contact Details

Select this link to change the contact person of the company specified in the Customer field. You can also change the contact's primary contact method and information.

Product

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 applications, the field prompts against all product descriptions.

Problem Type

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 only in PeopleSoft Support; the asset tag appears only in PeopleSoft HelpDesk. 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.

Address Type

If you are not sure about the full address, select *Intersection* and then enter information about the location where the problem occurred in the Address fields or the Detail field.

If you know the exact address, select *Address* and then enter the information in the address fields (PeopleSoft Support only).

Submit and **Submit and Search Solutions**	After the user submits the case, the page changes as follows: • A confirmation message appears at the top of the page, giving the user the case number for the newly submitted case. • All fields become read-only, and the Submit and Submit and Search Solutions buttons disappear. • Two new links appear: Update this Case and Create Another Case.

Managing Existing Self-Service Application Cases

This section discusses how to:

- Search for cases.
- View case information.

  You can view the billing amount.
- View the complete description of a problem.
- View case notes.
- Enter a new case note.
- Search for Solutions.
- You can configure your system to have suggested solutions—only if you have purchased NLP software.

  Also, multiple solutions can solve the case.
- View a solution that is associated with a case.

  You can see more information about the solution in the results area.
- Enter the reason for closing a case.

  Reopening a case will fail all successful resolution.
- Enter the reason for reopening a case.
- Change contact information.

Note. You can display a group box for a Billing Information by selecting this option on the display template. This section is delivered hidden.

Note. Also, A Grid for Actions grid will appear on the self-service Manage Case page, but not the details of the actions. Only those actions that are marked as internal will appear.

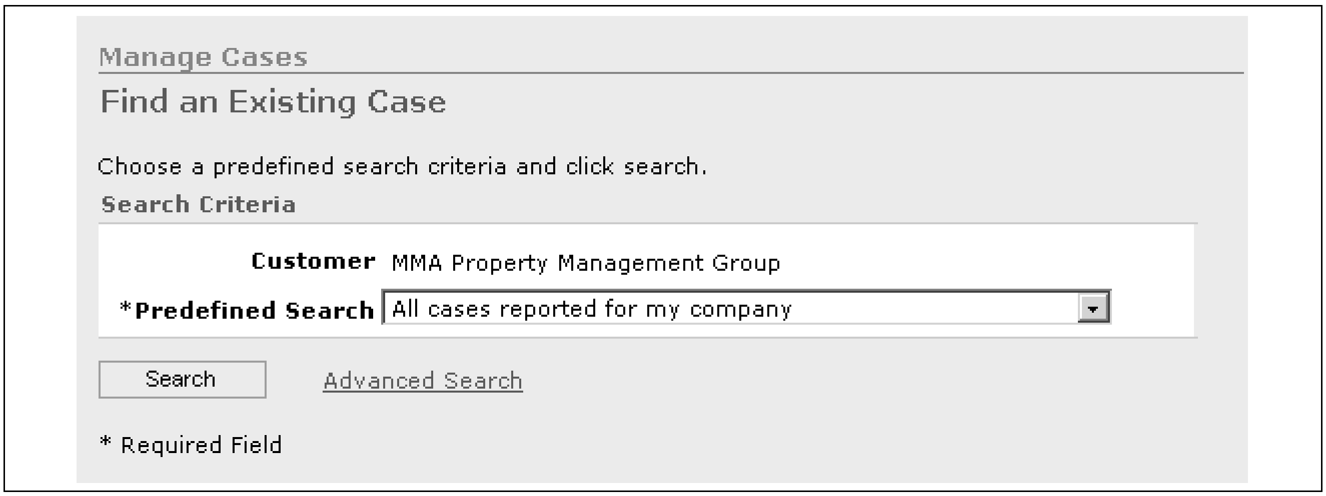
Pages Used to Manage Cases

Page Name	Object Name	Navigation	Usage
Find an Existing Case	RC_CASE_SW_SS_SRCH , RC_CASE_HD_SS_SRCH	• On the Customer Care page, click the Manage Cases link. • Employee Self Service, Manage a Case • Employee Self Service, Manage an HR Case	Search for cases to view in more detail.
Manage Case	RC_CASE_SW_SS, RC_CASE_HD_SS	Select a case from the list of search results on the Find an Existing Case page.	View case information. This page is also the starting point for several other processes: adding notes, changing contact information, requesting that an agent contact the user, searching for new solutions, and viewing solutions that are already under consideration for this case.
Problem Summary	RC_CASE_SW_SS_PROB , RC_CASE_HD_SS_PROB	On the Manage Case page, click the Problem Summarylink.	View the complete problem description if the summary on the Manage Case page does not provide enough information.
Note Details	RC_CASE_SW_SS_NDTL, RC_CASE_HD_SS_NDTL	On the Manage Case page, click the summary for a note in the Notes Summary grid.	View case notes from a Notes Summary grid. If there are attachments, an icon of a paperclip will appear in the Attachments column for a particular note.
Add a Note	RC_CASE_SW_SS_NADD, RC_CASE_HD_SS_NADD	On the Manage Case page, click the Add a Note or Attachment button.	Enter a new case note. **Note.** You must save the case to save the note.
Manage Case - Solution Details	RC_CASE_SW_SS_RSL2, RC_CASE_HD_SS_RDTL	On the Manage Case page, click the summary for a solution in the Solutions Considered grid.	View a solution that is already associated with a case and indicate whether the solution solved a problem.
Solutions	RC_SOLNSRCH_SW_SS, RC_SOLNSRCH_HD_SS	On the Manage Case page, click the Search for Solutionsbutton.	Search for a solutions to resolve this case.
Close Case	RC_CASE_SW_SS_CLSE, RC_CASE_HD_SS_CLSE	On the Manage Case page, click the Close Case button. This button is available only if the business unit rules permit self-service users to close cases.	Enter the reason for closing an open case.

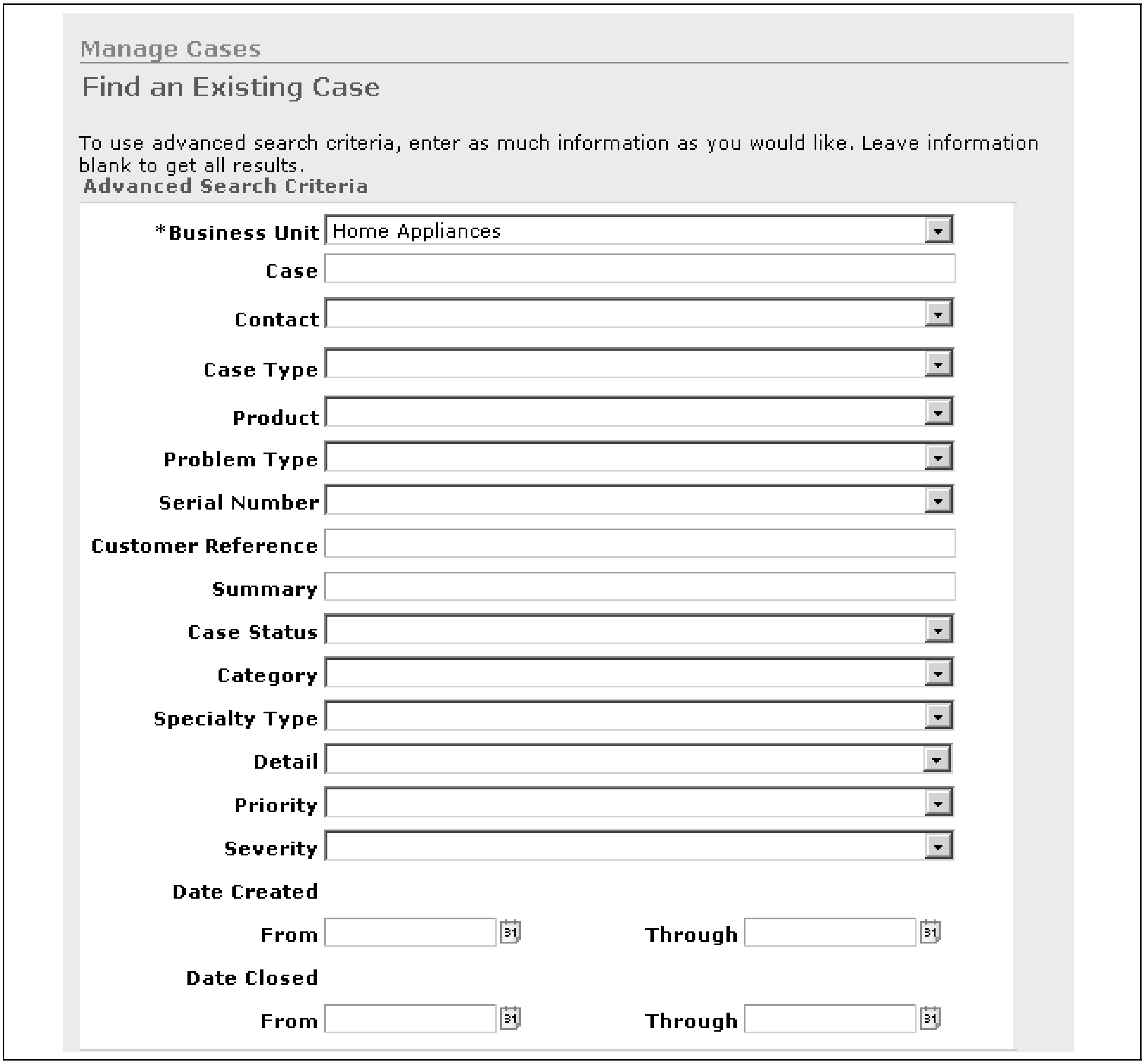
Page Name	Object Name	Navigation	Usage
Reopen Case	RC_CASE_SW_SS_ROPN, RC_CASE_HD_SS_ROPN	On the Manage Case page, click the Reopen Case button. This button is available only if the business unit rules permit self-service users to close cases.	Enter the reason for reopening a closed case. Reopening a case will cause all successful resolutions to be marked as a failed solution.
Edit Contact Information	RC_CASE_SW_SS_CONT, RC_CASE_SW_SS_CNTC, RC_CASE_HD_SS_CNTC	Click the Change Contact Information button on the Create Case page or the Manage Case page.	Change the contact information for a case.

Searching for Cases

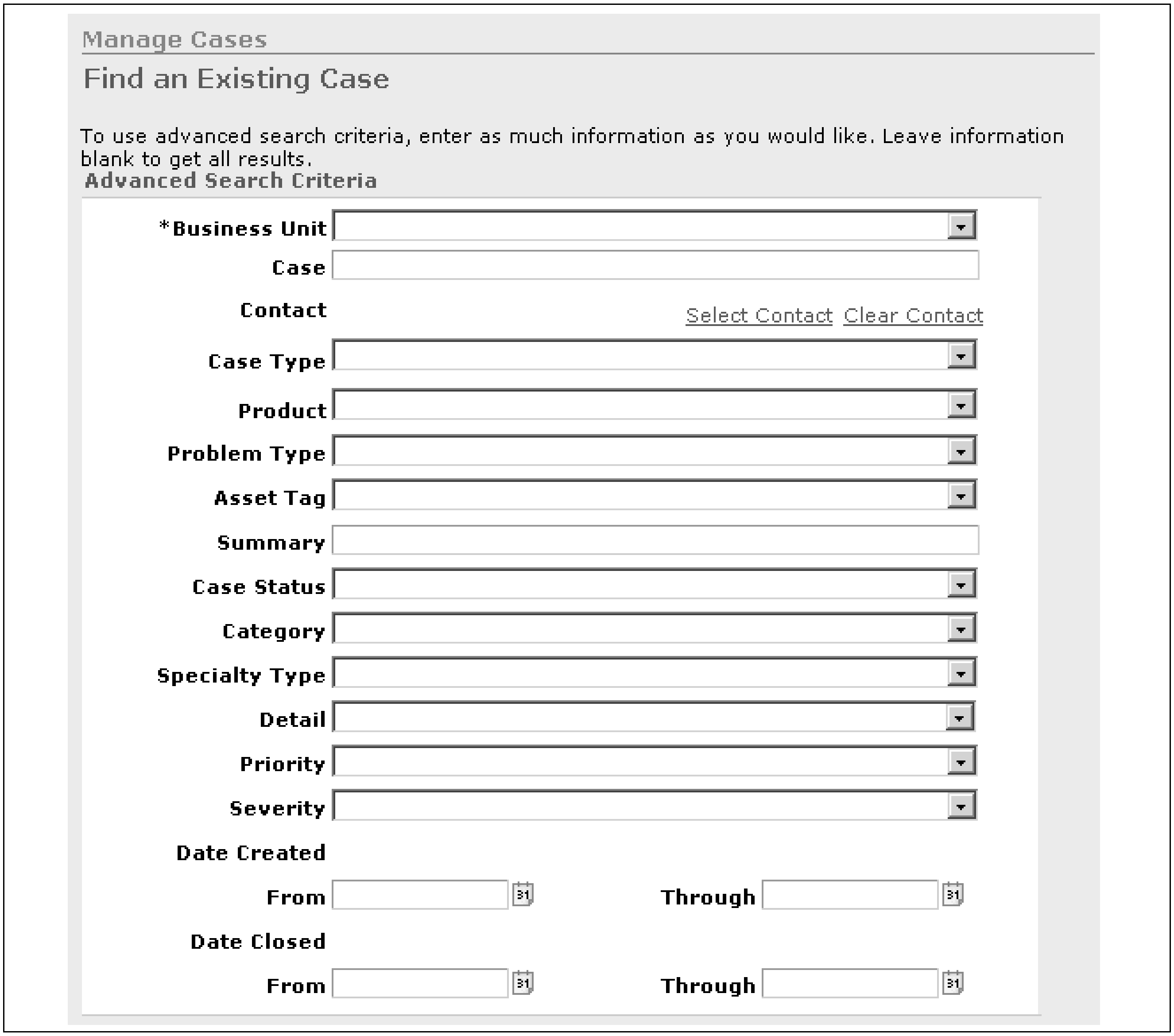
Access the Find an Existing Case page.



Find an Existing Case (1 of 3)



Find an Existing Case (2 of 3)



Find an Existing Case (3 of 3)

Note. The first screen shot shows the Case Search page for PeopleSoft Support in basic search mode. The second screen shot shows the page in advanced search mode. The third page shows the Case Search page for PeopleSoft HelpDesk. Note that you must click the Select Contact link to access contact information.

Values in one field are not dependent on values in any other. For example:

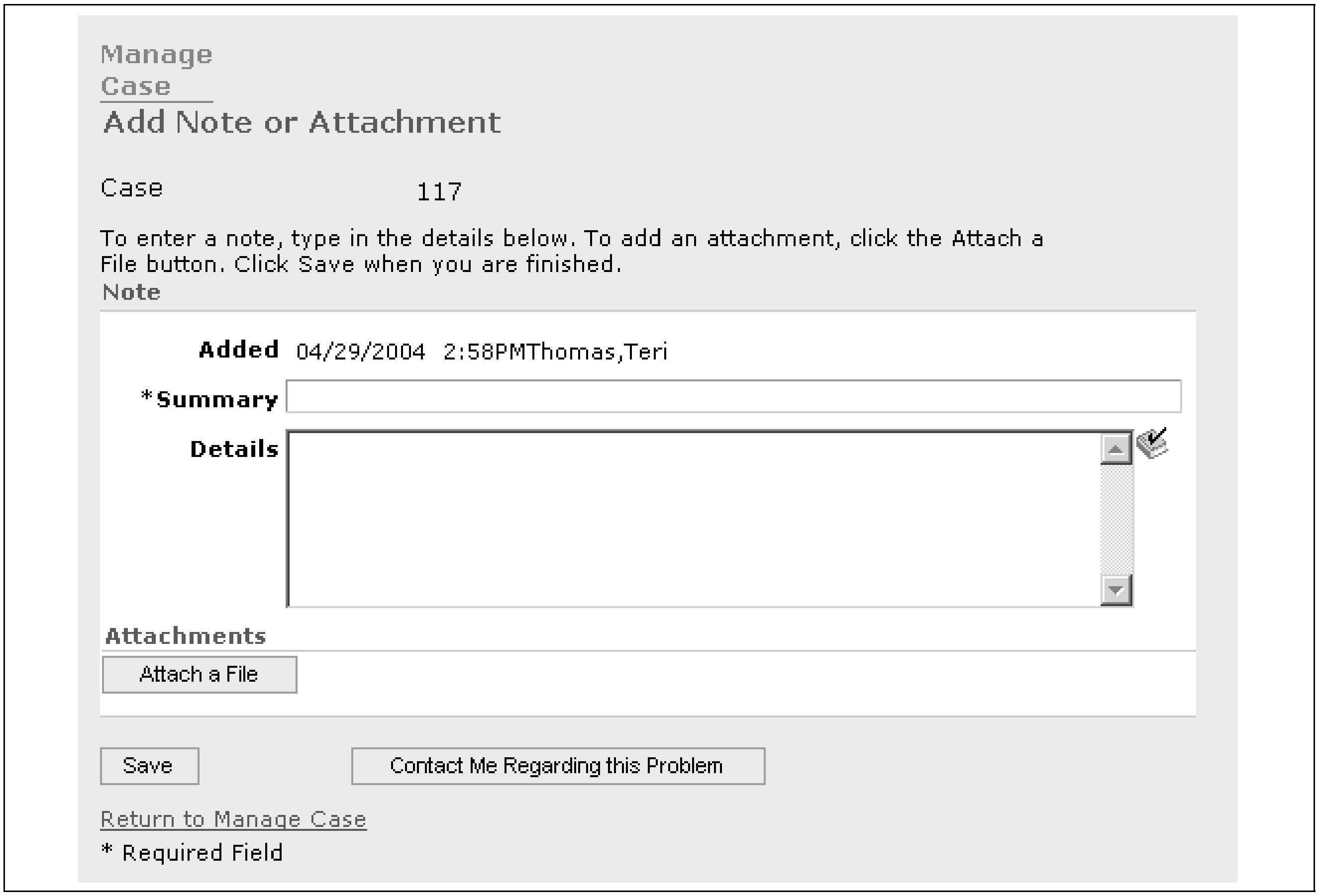
- Values are not limited by the selected business unit.
- Entering a category does not limit the values for the Specialty Type or Detail fields, and entering a specialty type does not limit the values for the Detail field.

See Also

Chapter 14, "Configuring Self-Service Applications," Updating Search Descriptions, page 226

Entering a New Case Note

Access the Add Note or Attachment page.



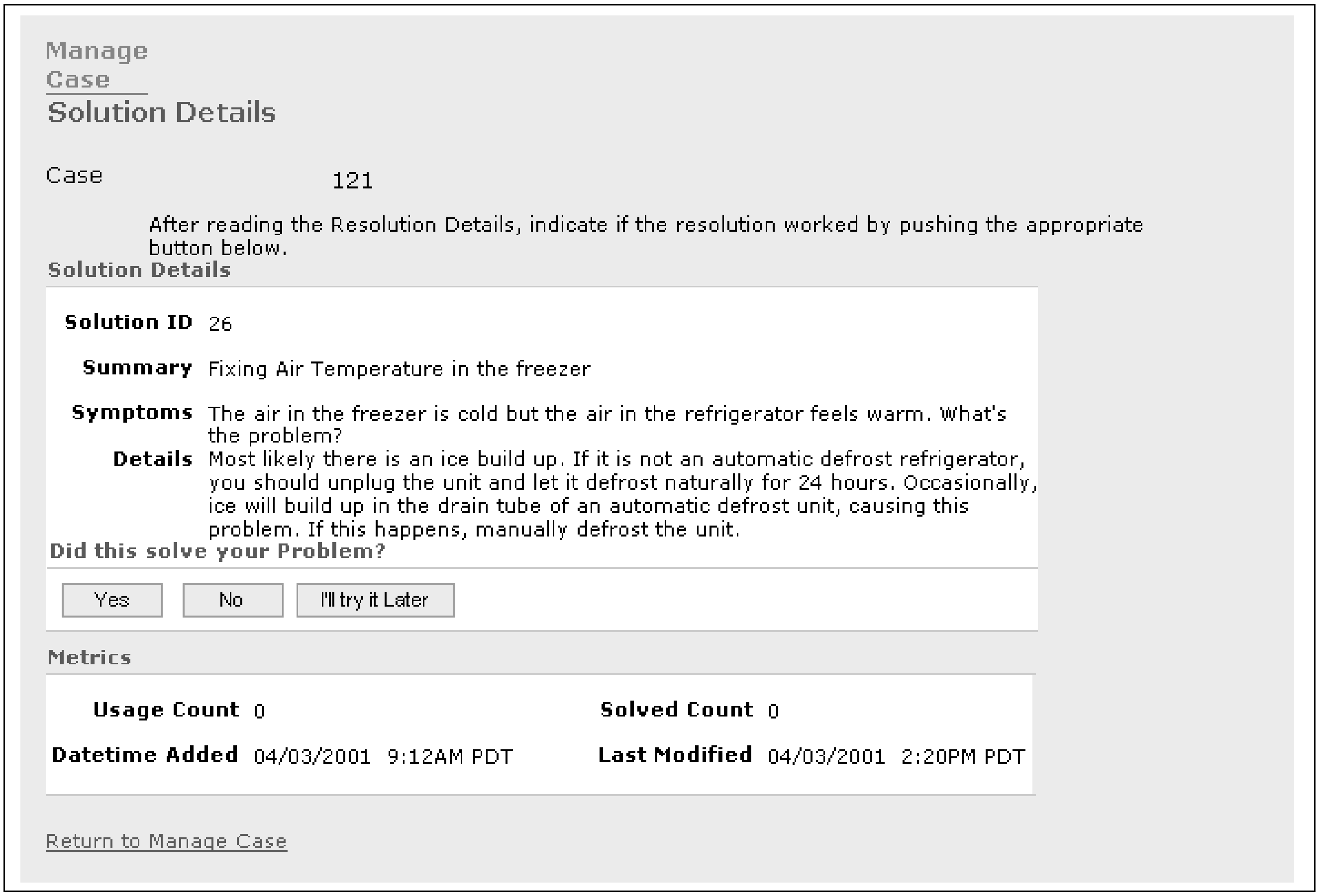
Manage Cases — Add Note or Attachment page

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments,” Adding Attachments to Notes

Viewing a Solution That is Associated with a Case

Access the Manage Case - Solution Details page.



Manage Case — Solution Details page

If the user searches from within a case and answers the question "Did this solve your problem," the system adds the solution to the list of attempted solutions for the case. The resolution status depends on the button that the user clicks:

- If the user clicks Yes, the status is *Successful Resolution.*
- If the user clicks No, Continue Search the status is *Failed Resolution.*
- If the user clicks I'll try it later, the status is *Waiting on Customer.*

The Did this solve your Problem region does not appear if there is already a resolution with the status *Successful Resolution.*

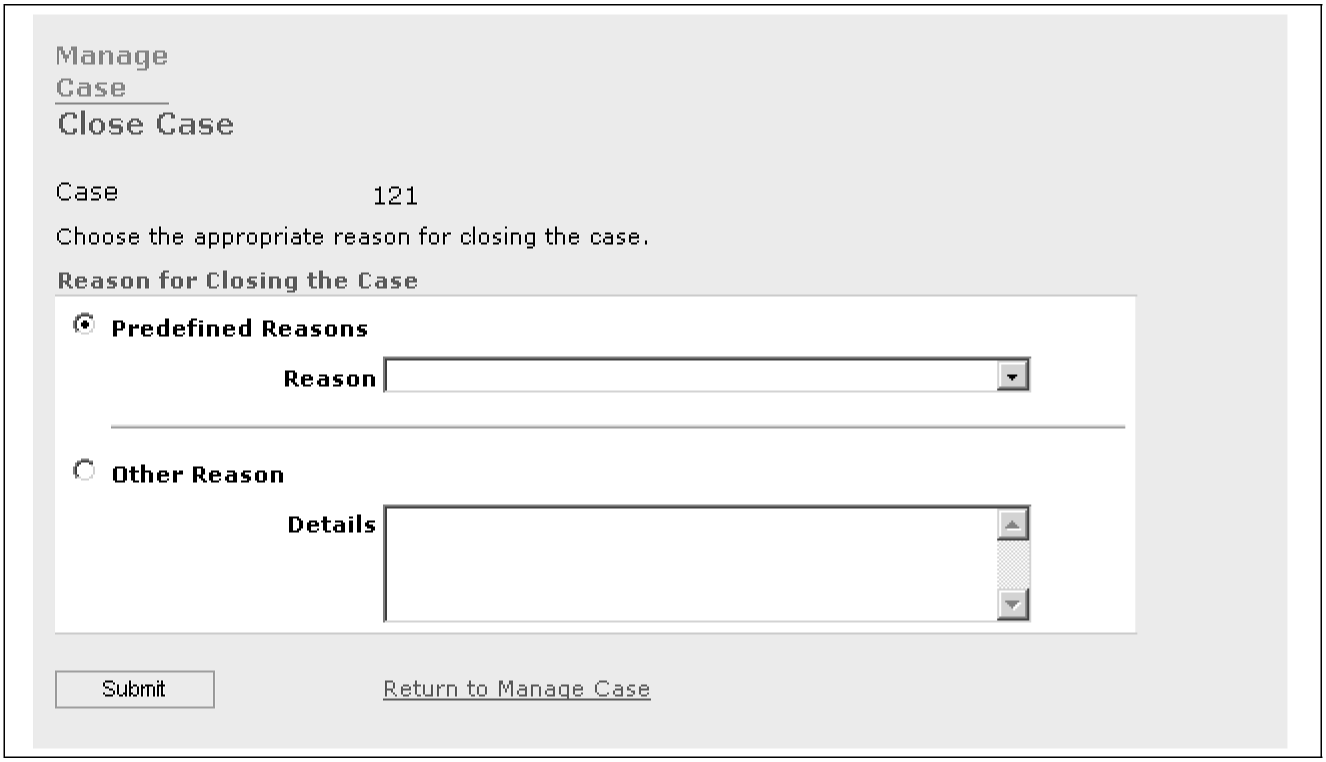
See Also

Chapter 15, "Working with Self-Service Application Transactions," Solution Tracking in Self-Service, page 232

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, "Managing Solutions"

Entering the Reason for Closing a Case

Access the Close Case page.



Manage Case — Close Case page

Predefined Reasons Select this option and enter a reason if you want to choose from predefined reasons. The available reasons are those of the type *Reason Closed* from the Reason Code page.

Other Reason Select this option and enter the reason in the Details field if you want to enter a free-form text reason.

Submit When the user clicks this button, the system changes the case status to the value that is specified in the Closed Case Status field on the Case Defaults page.

If a user selected a predefined reason from the Reason field, the system resolves the case by using the solution that is identified on the Reason and Solution Link page. If no solution is linked to the selected reason code, the system creates one (using the solution type *Canned)*and updates the Reason and Solution Link page accordingly.

If a user entered a reason in the Details field, the system uses the text to create a new solution of type *Adhoc*. The solution then resolves the case using the newly created solution.

See Also

Chapter 14, "Configuring Self-Service Applications," Associating Solutions with Reasons for Closing Cases, page 225

Chapter 3, "Setting Up Call Center Prompt Tables," Setting Up Reason Codes, page 44

Chapter 2, "Defining Call Center Business Units and Display Template Options," Setting Up Case Defaults, page 17

Entering the Reason for Reopening a Case

Access the Reopen Case page.

Predefined Reasons	Select this option and enter a reason if you want to choose from predefined reasons. The available reasons are those of the type *Reason Re-Opened* from the Reason Code page.
Other Reason	Select this option and enter the reason in the Details field if you want to enter a free-form text reason.
Submit	When the user clicks this button, the system changes the case status to the value that is specified in the Reopened Case Status field on the Case Defaults page. The reason—predefined or free-form text—becomes a resolution note.

See Also

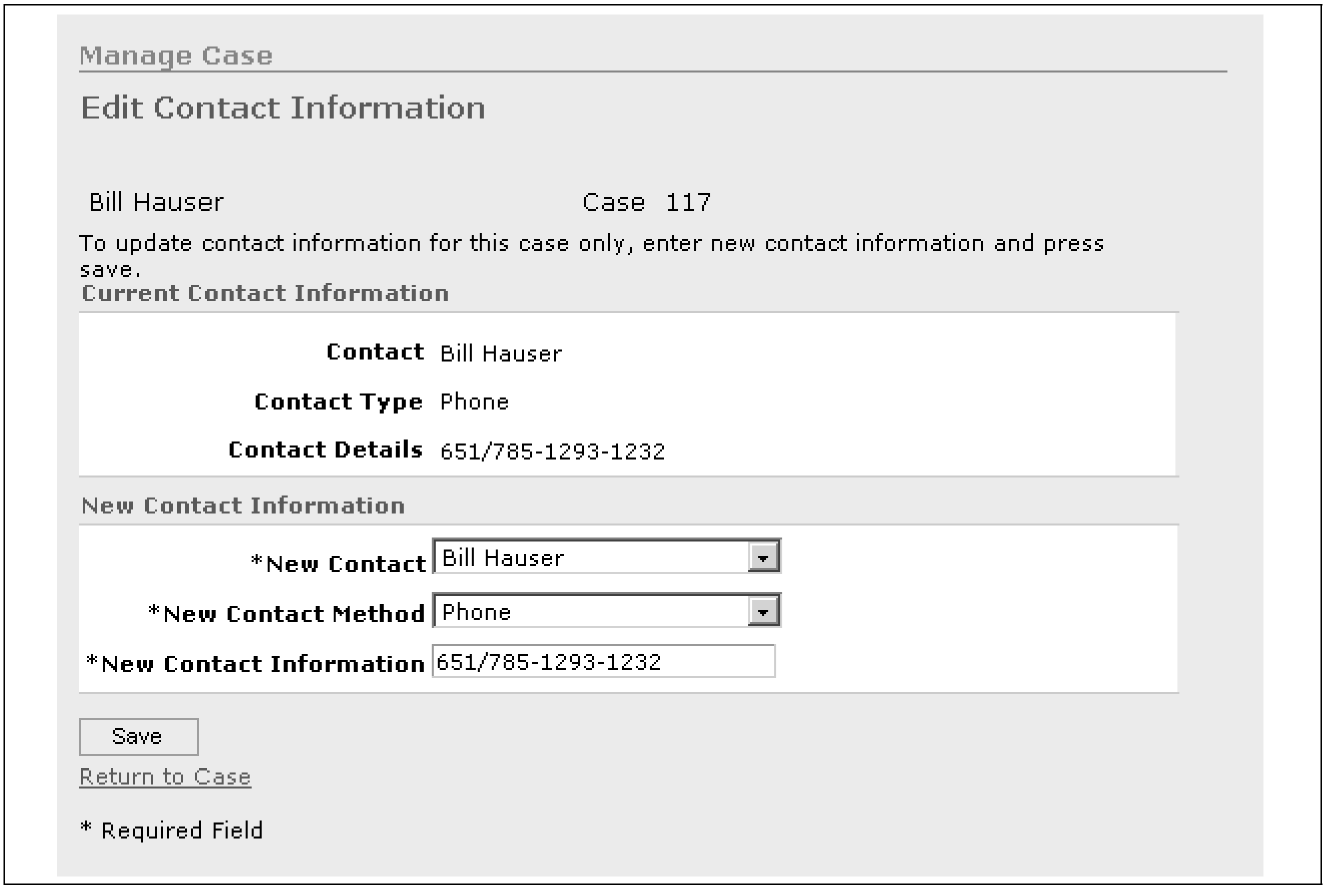
Chapter 14, “Configuring Self-Service Applications,” Associating Solutions with Reasons for Closing Cases, page 225

Chapter 3, “Setting Up Call Center Prompt Tables,” Setting Up Reason Codes, page 44

Chapter 2, “Defining Call Center Business Units and Display Template Options,” Setting Up Case Defaults, page 17

Changing Contact Information

Access the Edit Contact Information page.



Manage Case — Edit Contact Information

The appearance of this page varies slightly depending on whether the user is a company contact person (PeopleSoft Support), a consumer (PeopleSoft Support), or a worker (PeopleSoft HelpDesk).

You can change contact information when you are creating a new case or viewing an existing case.

On the Create Case page, the Change Contact Information button is available only until the case is submitted. After submitting the case, use the Manage Cases component to change the contact information.

Searching for Solutions

This section discusses how to:

- Perform a basic solution search.
- Search for solutions by using field-specific search criteria.
- View a solution and indicate whether the solution solved a problem.

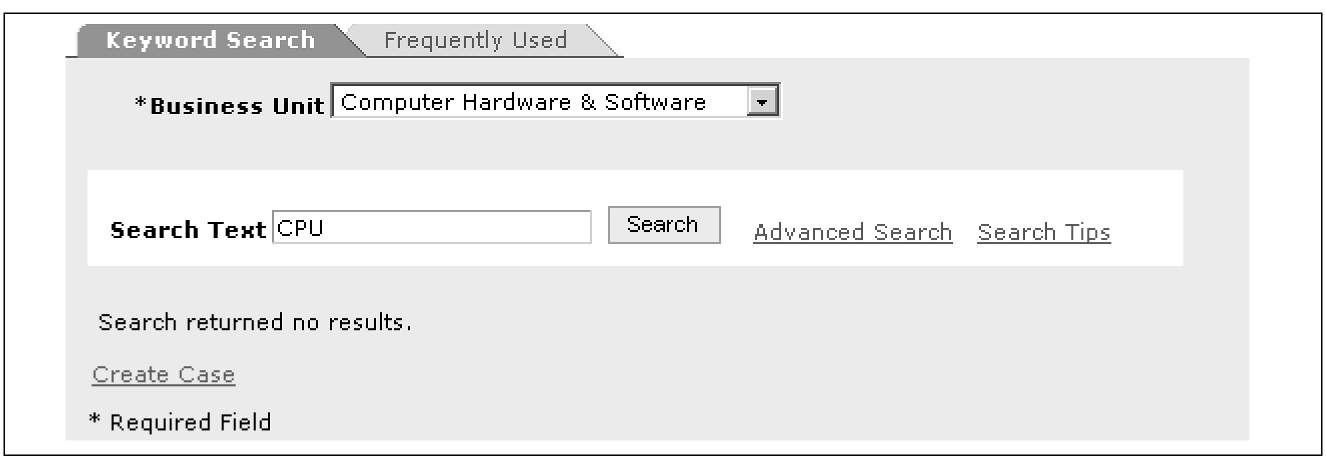
Note. You will have access to the Suggested Solutions tab only if you have purchased NLP (natural language processing) application.

Pages Used to Search for Solutions

Page Name	Object Name	Navigation	Usage
Keyword Search page	RC_SOLNSRCH_SW_SS, RC_SOLNSRCH_HD_SS	• On the Customer Care page, click the Search Resolutions link (PeopleSoft Support only). • Employee, HelpDesk, Search Solutions • Employee, HR Help Desk, Search Solutions • On the Search Solution - Advanced page, click the Basic Search link. • On the Manage Case page, click the Search for Solutions button. • On the Create Case page, click the Submit and Search Solutions button. • Employee Self-Service, Search Solutions (PeopleSoft HelpDesk applications only)	Perform a basic solution search.
Keyword Search page – Advanced	RC_SOLADVSRH_SW_SS, RC_SOLADVSRH_HD_SS	On the Search Solution page, click the Advanced Search link.	Search for solutions using field-specific search criteria.
Search Solution - Solution Summary	RC_SOLN_SUMM_SW_SS, RC_SOLN_SUMM_HD_SS	On the Keyword Search or Keyword Search - Advanced page, click the summary of a solution in the search results list.	View a solution and indicate whether the solution solved a problem.

Performing a Basic Solution Search

Access the Keyword Search page.



Keyword Search page: Basic search

Business Unit
The business unit is required; only solutions from the corresponding setID are included in the search results. If you configure self-service so that the field is not visible, you must make sure that each user has a default business unit that will populate the field.

The business unit prompt shows business units for all markets.

Frequently Used Solutions
To search for frequently used solutions, first select a product by clicking the Choose a Product link.

Search Text
When searching by keyword, Solution Advisor performs a Verity search that looks for the keyword in any field that is included in the search index template for solutions. Restricting keyword searches by product is optional.

Advanced Search
Click this link to access the Search Solution page for advanced searches, which accepts field-specific search criteria.

Search
Click this button to perform a search. The search results appear at the bottom of the page.

Create Case
This link appears when you are searching for solutions outside the context of a case.

Return
This link appears when you are searching for solutions within the context of a case.

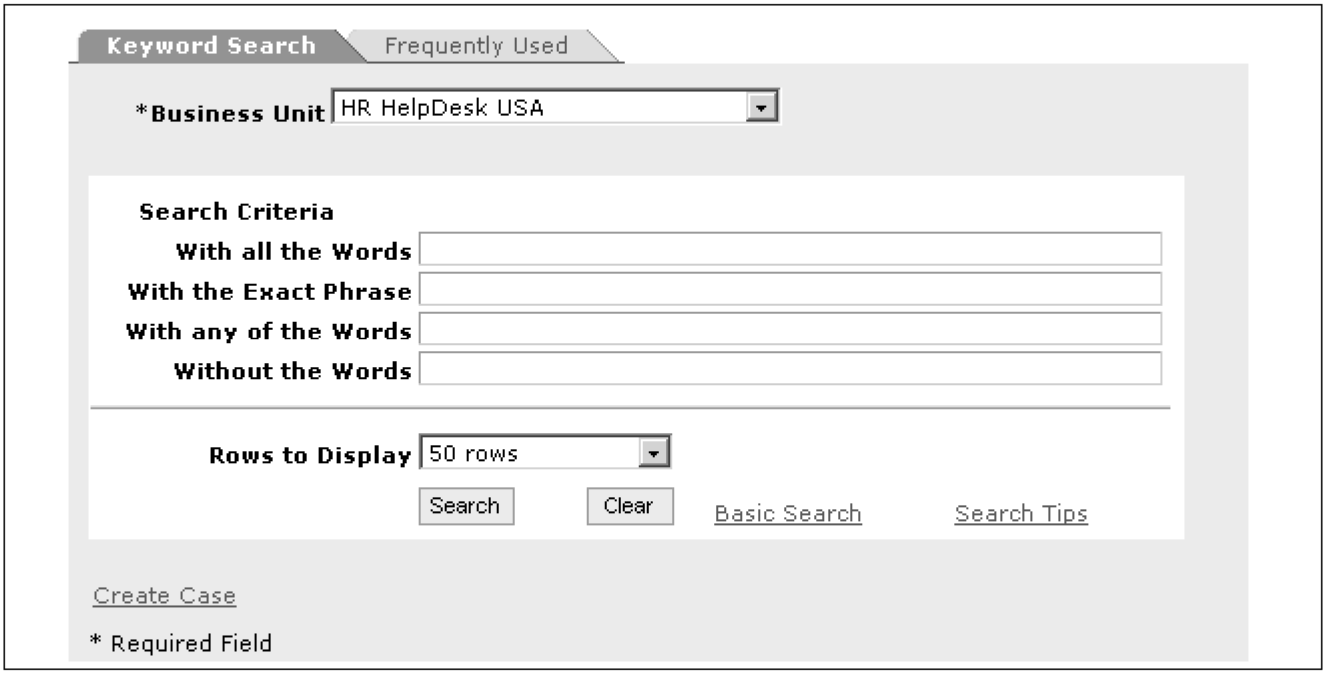
Access the Frequently Used page:

Frequently Used page

To search for frequently used solutions, first select a product by clicking the Choose a Product link.

Searching for Solutions By Using Field-Specific Search Criteria

Access the Search Solution - Advanced page.



Keyword Search page, Advanced search

More advanced search options of searching over particular domains is reserved for agent-facing cases only.

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, "Setting Up Solution Management"

Accessing FAQs

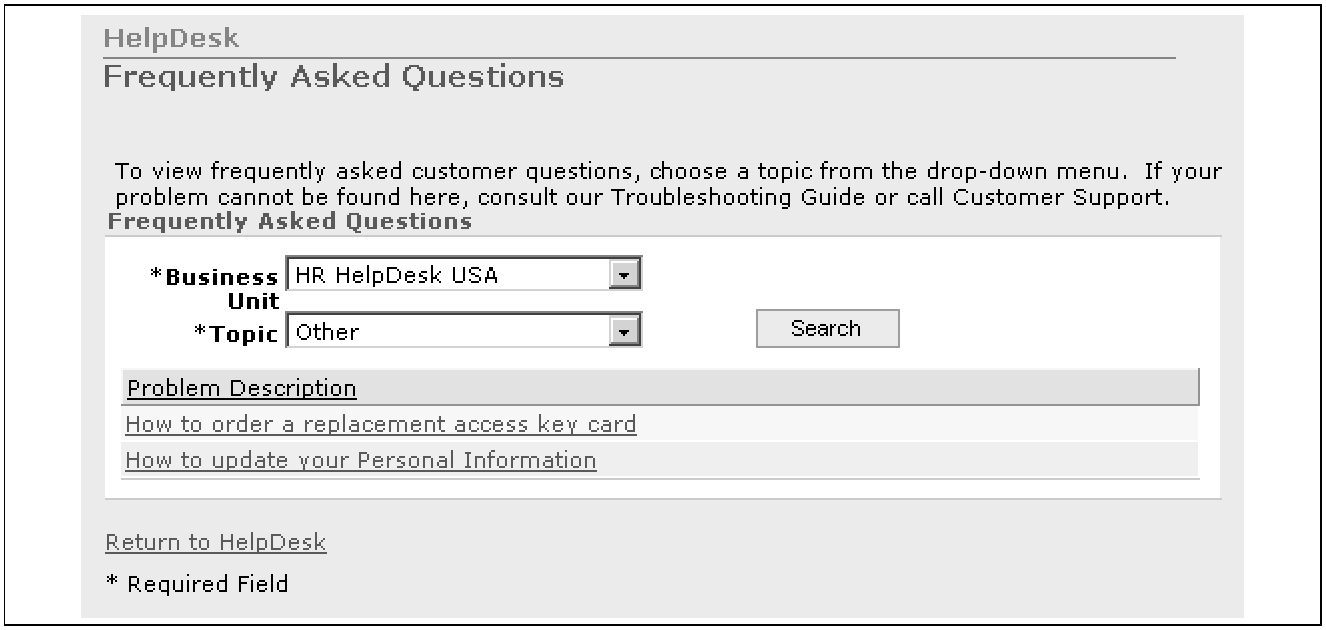
This section discusses how to select and review a FAQ.

Pages Used to Access Frequently Asked Questions

Page Name	Object Name	Navigation	Usage
Frequently Asked Questions	RBT_FAQ_SOL_SS	• On the Customer Care page, click the FAQ link. • Employee Self-Service, HelpDesk, FAQ • Employee Self-Service, HR Help Desk, FAQ	Select a topic and view a list of frequently asked questions for that topic.
View Solution	RBT_FAQ_PG_SS	Click a problem description on the Frequently Asked Questions page.	Review a solution that is related to a frequently asked question.

Selecting a FAQ

Access the Frequently Asked Questions page.



Frequently Asked Questions page

Business Unit This field may have a different label, depending on how you configure self-service. If you do not show business unit on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page.

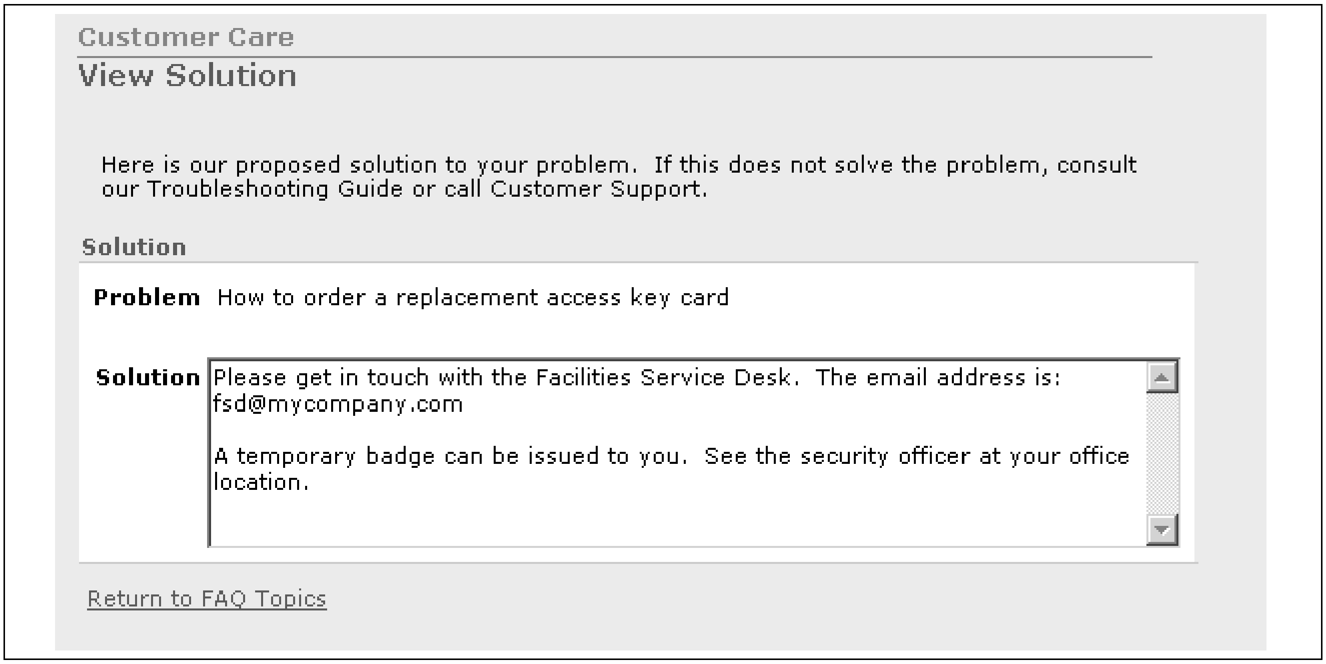
Topic Select from a list of solution libraries that you set up on the Troubleshooting Guide setup page. Each library is associated with a single script.

Search Click this button to display a list of solutions in the selected library. Only solutions with a visibility of *All* appear.

Problem Description Displays the list of solutions in the selected library. Click a question to access the View Solution page and review information that is related to the question.

Reviewing Solutions

Access the View Solution page.



View Solution page

Selecting and Running Troubleshooting Guides

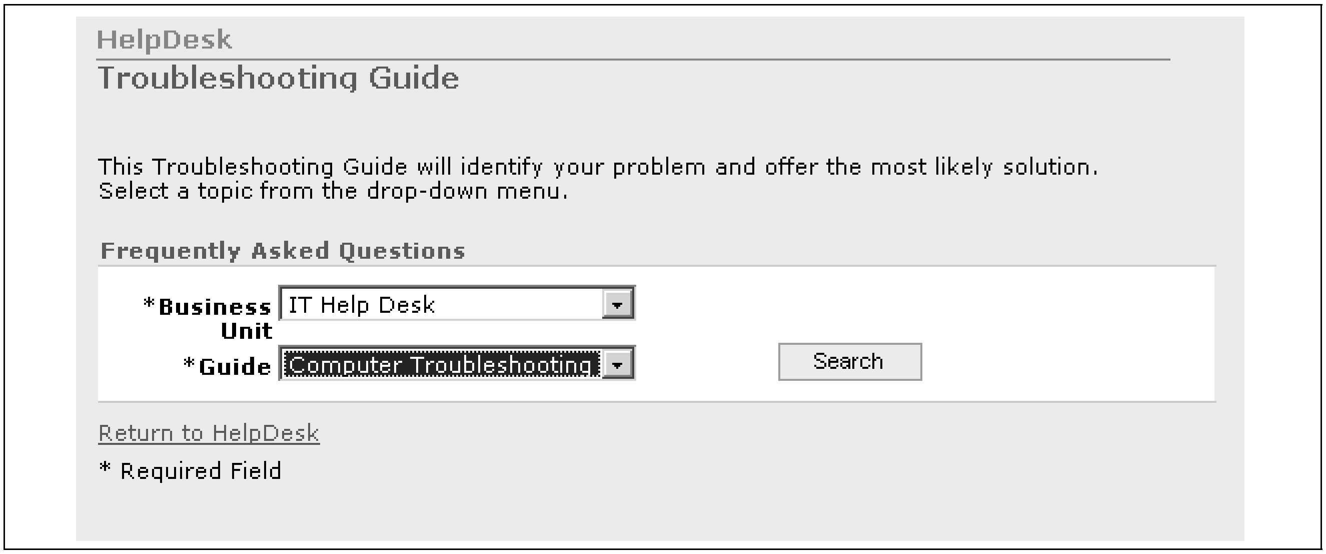
This section discusses how to select and run troubleshooting guides.

Pages Used to Select and Run Troubleshooting Guides

Page Name	Object Name	Navigation	Usage
Troubleshooting Guide	RBT_TGUIDE_SS	• On the Customer Care welcome page, click the Troubleshooting Guide link. • Employee Self-Service, HelpDesk, Troubleshooting Guide • Employee Self-Service, HR Help Desk, Troubleshooting Guide	Select a troubleshooting guide.
Execute Script	RC_BS_SELF_CONFIG	On the Troubleshooting Guide page, select a solution library and click the Search button.	Run a troubleshooting guide script.

Using Troubleshooting Guides

Access the Troubleshooting Guide page.



Troubleshooting Guide page

Business Unit

This field may have a different label, depending on how you configure self-service. If you do not show 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.

Search

Click to display the Execute Script page and run the script that is associated with the selected library.

Running Scripts in Self-Service

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Running Scripts,” Running Scripts on Self-Service Pages.

APPENDIX A

Integrating the Case with Third-Party Systems

This appendix provides an overview of the case enterprise integration point (EIP) and discusses:

- Case EIP functionality.
- Case EIP implementation.

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, and all PeopleSoft CRM verticals. The case EIP allows 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 appendix serves as a guide for technical users, installers, system administrators, and programmers who implement, maintain, or develop Case EIP.

Defining Case EIP Functionality

In this section, we discuss:

- Assumptions about the case EIP.
- Case EIP functionality.
- Delivered EIPs.
- Technical process flows for the EIPs.
- Error Handling.

Assumptions About the Case EIP

When considering the case EIP, you must consider the following:

- To create a support case, the following customer information fields must be provided: customer BO ID, customer role type ID, contact BO ID.

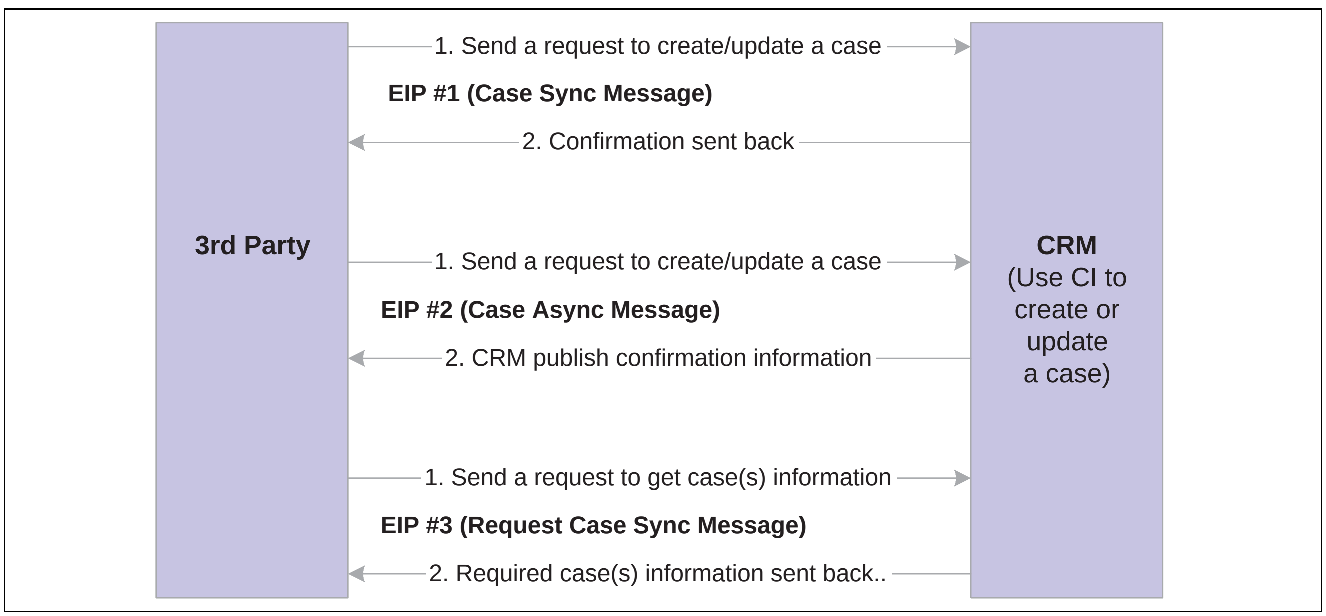
- The third-party system needs to send the appropriate business unit, vertical and market values in the request, unless these values can be defaulted from user reference.
- The case EIP is developed using PeopleTools 8.4 integration broker technology.
- There is no bulk loading using the case EIP. The case EIP feature is intended to automatically create and update cases from third-party systems, 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 customer, contact and employee information is left as 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, etc.). Different data types are stored 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 hide or unhide fields on the case page. The case component is rendered based on the display template. When customers send 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 based on configuration settings.

  See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates".

Case EIP Functionality

The case EIP provides a bi-directional EIP in CRM for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and all PeopleSoft CRM verticals. It provides a transactional framework that enables your call center to send and receive case information to and from any third-party applications.

This diagram illustrates the case EIP process flow:



Case EIP process flow

Delivered EIPs

The following EIPs, as shown in the previous diagram, are provided:

- EIP #1 - Case Synchronous EIP.
- EIP #2 - Case Asynchronous EIP.
- EIP #3 - Request Case Information EIP (Synchronous).

Note. If the request contains a case ID, a new case will not be created. The existing CRM case will be updated with the pertinent information supplied in the request. If the case ID passed in is invalid, no case will be updated, and an error message will be sent back.

Note. Tip: When you create a case, make sure the value of the CASE_IDfield 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 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 case is processed in CRM, confirmation information is sent back to third-party.

This EIP contains 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 into the case component. A response message is sent 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 will be waiting for the response from CRM, only one case will be processed 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 will publish confirmation information back to third-party.

It contains two messages:

- RC_CASE_REQUEST_ASYNC — Inbound asynchronous message.
- RC_CASE_RESPONSE_ASYNC — Outbound asynchronous message.

The processing details are as follows: when CRM receives the request, subscription people code will call the appropriate case CI to create or update a case, and publish case information back to 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 will process them one by one. A commit will be issued at 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 process the request, and send the case(s) information back to the third-party system.

It contains two messages:

- RC_CASE_INQUIRY_REQ_SYNC — Inbound synchronous request message

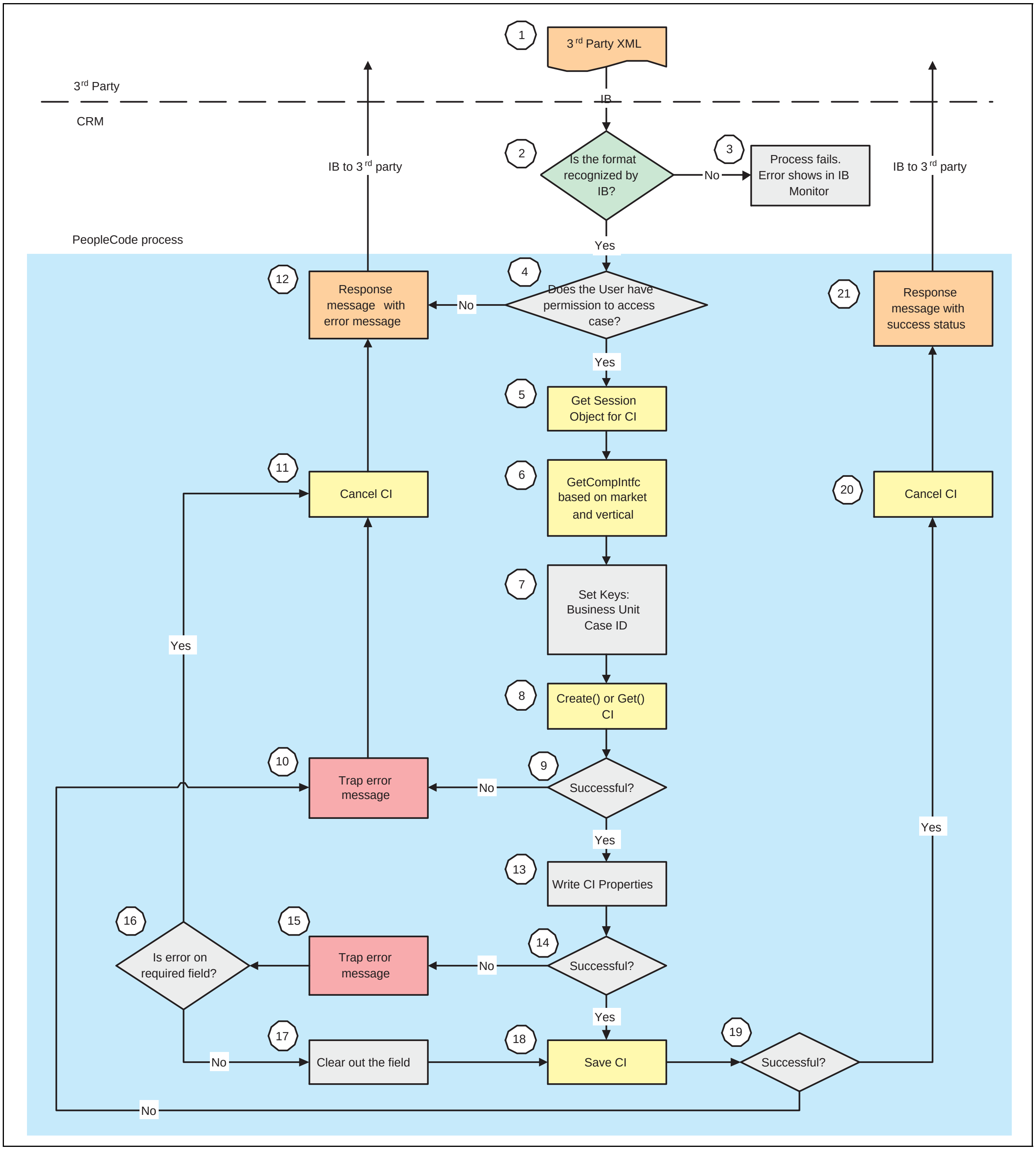
- RC_CASE_INQUIRY_RESP_SYNC — Outbound synchronous response message

The processing details are as follows: the request message may have one or more Case IDs, the —on request event—will be triggered, and CRM will process the rowset of the message to populate case information, one by one. A direct SQL query will be used instead of CI.

Technical Process Flows

The logic of EIP #1 and #2 are the same except they way in which they are initiated. EIP #1 is triggered from an OnRequest event. A sync response message is generated and returned to the to third-party system. EIP #2 is triggered from message subscription PeopleCode. A response message is published for the third-party application. EIP #1 and #2 share the same PeopleCode function, ProcessCaseEIP defined in the FUNCLIB_RC_EIP.CASE_EIP field formula.

The following diagram illustrates the technical process flow for both EIP #1 and EIP #2.



Process Flow Diagram for EIP #1 and EIP #2

The following numbered 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.

3. If integration broker (IB) does not recognize the format, the message will be trapped in integration broker. The process will fail. This is standard integration broker functionality.

See *PeopleSoft Integration Broker*

4. OPRID is required. It is used to validate whether the user has access to the requested case. Once the user passes security checking, a case will be created or updated through integration broker. The integration broker user ID will be used to create or update a case. This is the user ID that is used to start application server.

5. If the user passed the security check, a session is obtained for component interface processing.

6. When creating a case, BUSINESS_UNIT is required. The system will automatically assign the next new CASE_ID. If BUSINESS_UNIT is not supplied when creating a case, CRM will use the default business unit from user preference. When updating a case, only CASE_ID is required since it is unique identifier.

7. Based on the keys set, the system decides whether to insert or update a case. When there is no Case ID provided, CRM will create a case by calling the *create()* method of CI. When the Case ID is provided, CRM will check whether the Case ID exists in CRM. If it exists, the case will be updated by calling the *get()* method; otherwise, no case processing will be done. A response message will be generated 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 CASE_ID FieldFormula checks if the case exists.

8. If the create() or get() method fails, the error message will be generated in RC_CASE_EIP_ERR for the response message. The CI will be canceled to reset the instance (process 11), and the response message with the error message will be sent back to third-party (process 12).

9. Once the create() or get() method passes successfully, CRM will set the CI properties as supplied in the request message.

When the third-party application sends a request to create a support case, customer and contact information is required.

For customer information, the third-party application can either provide CUST_ID or BO_ID_CUST. If BO_ID_CUST is provided, CRM will use it directly to create a case. Conversely, if only CUST_ID is provided, CRM will use the BC table to derive BO_ID_CUST in order to create a case.

The function to get BO_ID_CUST 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 PERSON_ID or BO_ID_CONTACT. When BO_ID_CONTACT is provided, CRM will use it directly; otherwise, CONTACT_PERSON_ID will be used to derive BO_ID_CONTACT from the RD_PERSON table.

The function to get BO_ID_CONTACT based on PERSON_ID is the PeopleCode Function *GetPersonBObyID* in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

HelpDesk and HelpDesk for Human Resources Cases Only

When the third-party application sends a request to create a helpdesk case, employee information must be provided. The third-party application must supply the EMPLID, and CRM will use it to derive appropriate BO_ID_CUST with ROLE_TYPE_ID_CUST in order to create a case. BO_ID_CUST and ROLE_TYPE_ID_CUST need to be populated internally for a case.

Note. Tip: When creating a support case for 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 PeopleSoft HelpDesk case for an employee, make sure the EMPLID is provided.

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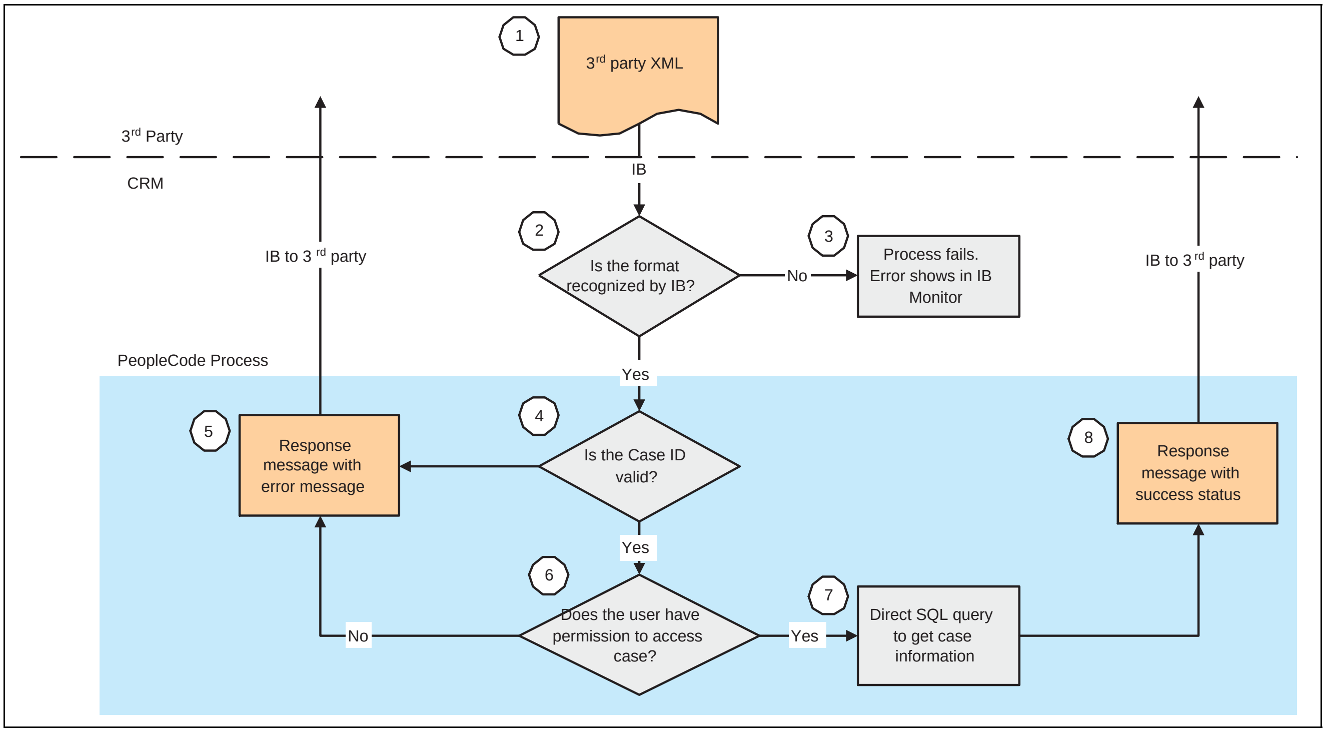
15. If the setting of a CI property for a field fails, an error message will be trapped in the &PSMessage object with information on which field causes an error.

The following diagram illustrates the technical process flow for EIP #3.



Process Flow Diagram 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, it will be trapped in integration broker. Case process will fail.

See *PeopleSoft Integration Broker*

3. When message passed in from integration broker, people code process will begin. CRM will check if the case ID exists in CRM. If the case does not exist in CRM, a response message with error message will be sent back (process 5).

4. If the case exists in CRM, market and vertical information will be gathered, and CRM will further check if the user has access to case component based on market and vertical. If user does not have access, a response message will be sent back right away with error message of access denied (process 5).

Function to check access permission: IsUserAuthorized in FUNCLIB_RC_EIP.CASE_ID FieldFormula.

5. Once the user passed the security check, a direct SQL query will be executed to get all case related information and send back to third-party (process 8).

Error Handling

When a required field contains an invalid value in request message, or the save event fails, the process will fail. The request message will be copied over to response message, and the response message will be sent back to third-party with error message.

When a non-required field contains an invalid value, that field will be ignored or and case processing will continue. A warning message will be sent back.

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 will contain case information stored in CRM system. When status is

1, i.e. when case is failed, nothing is saved in the CRM system, and the response message will contain a copy of the request information, not the case information stored in CRM. This is provided to aid in error handling.

- When CASE_EIP_STATUS fails or there is a warning warning, a detailed error or warning message will be logged in the rowset RC_CASE_EIP_ERR of the response message.

Implementing Case EIP

In this section, we discuss:

- 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 Message RC_CASE_REQUEST_SYNC OnRequest Peoplecode. It calls ProcessCaseEIP function in FUNCLIB_RC_EIP.CASE_EIP FieldFormula.

For Case EIP #2 (Case Asynchronous Message), the entry point is in Message RC_CASE_REQUEST_ASYNC, Message Subscriptions CaseRequestAsync peoplecode, it calls the same ProcessCaseEIP function as EIP #1.

For Case EIP #3 (Request Case Synchronous Message), the entry point is in Message RC_CASE_INQUIRY_REQ_SYNC OnRequest Peoplecode. It calls ProcessCaseInquiry function in FUNCLIB_RC_EIP.CASE_EIP FieldFormula.

Setup Configuration

There are three setup options for case EIP:

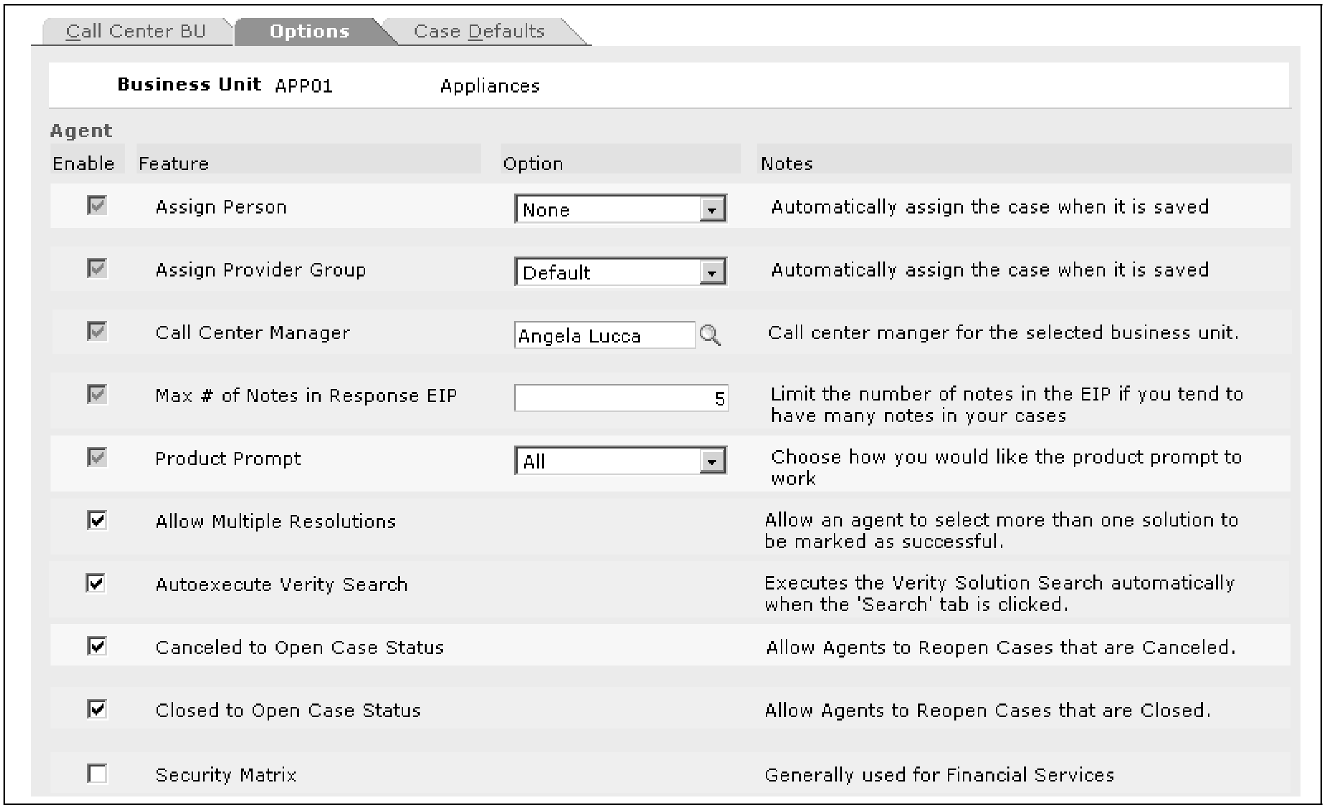
- Number of notes for a case
- Default value for Source EIP

Number of Notes for a Case

The Max # of Notes in Response EIP field indicates most number of notes to return in the request EIP. The case component can contain an unlimited number of notes. This will impact case EIP performance when trying to process hundreds, thousands notes for a case. Based on business requirement, customer can set the upper limit number for case EIP. Note, This is only applied to response message. Request message will process all notes that third-party sends.

For instance, the customer sets the default number of notes for response message as 5. When request message contains more then 5 notes, all the notes will be processed and saved into the case. When a case contains more than 5 notes, and third-party is requiring the case information, then only the 5 most recent notes will be returned in the response message.

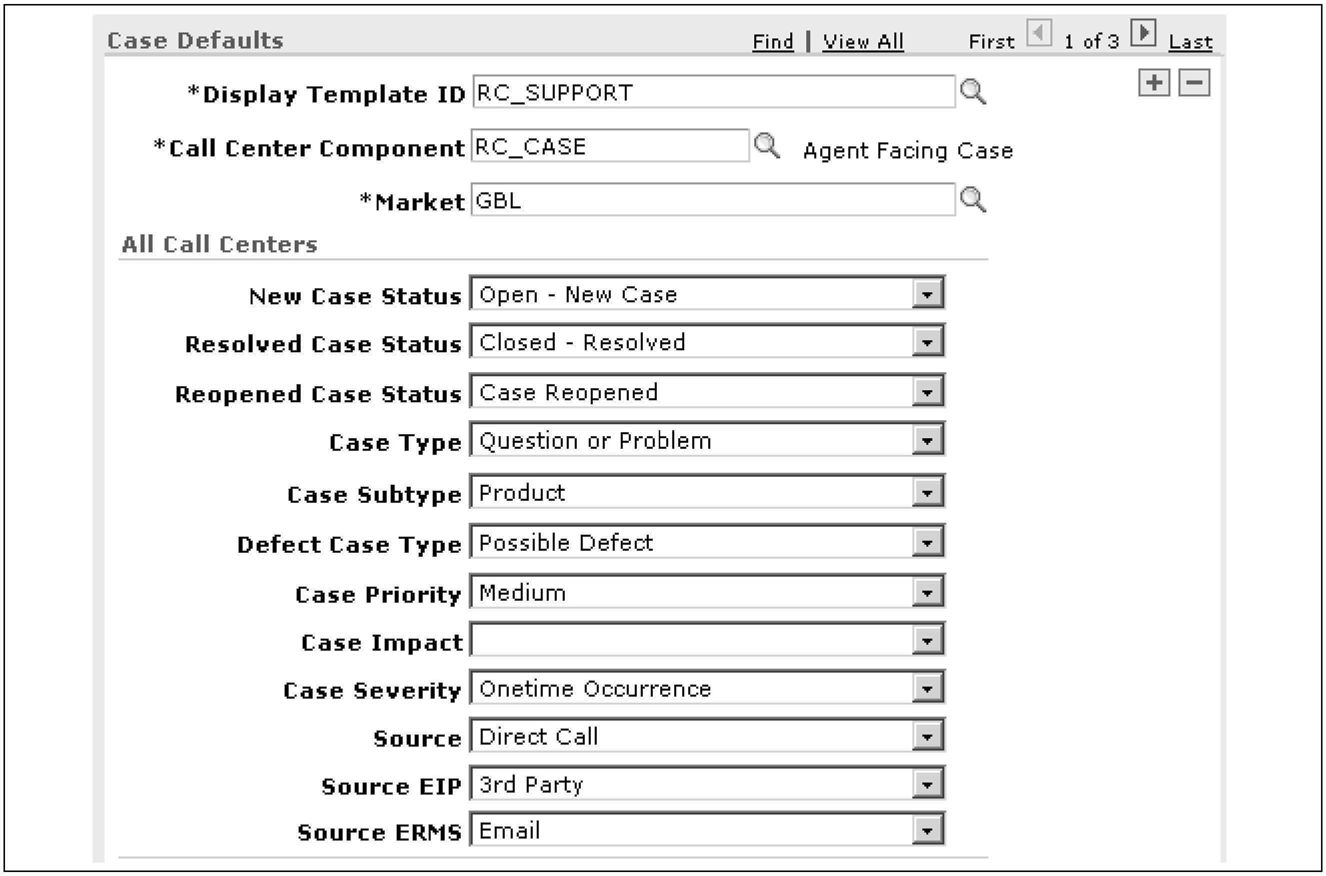
This screenshot illustrates the Max # of Notes in Response EIP field on the Call Center Definition – Options page.



Call Center Definitions – Options page

Default Value for Source EIP

Customer can define the source value to use when creating a case via the Case EIP. It can be a different source value from that of cases created on line.



Case Defaults page

Note. These two options are all driven by business unit.

Case EIP Setup

Activate the following messages:

- RC_CASE_REQUEST_SYNC
- RC_CASE_RESPONSE_SYNC
- RC_CASE_REQUEST_ASYNC
- RC_CASE_RESPONSE_ASYNC
- RC_CASE_INQUIRY_REQ_SYNC
- RC_CASE_INQUIRY_RESP_SYNC

As delivered, PeopleSoft EIP application messages are inactive. In both your PeopleSoft CRM and your third-party application, activate the required application messages, activate the message subscription PeopleCode, set the associated message channel to run mode, configure an existing message node or define a new message node, and define asynchronous or synchronous transactions on the message node.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Application Messages.

See Also

PeopleSoft Integration Tools and Utilities

PeopleSoft Integration Broker

APPENDIX B

PeopleSoft Call Center Interactive Reports

This chapter provides an overview of Interactive Reports and discusses how to launch and work with them.

Note. Interactive Reports are available in PeopleSoft Support and HelpDesk applications.

Understanding Interactive Reports

PeopleSoft call center Interactive Reports are a lightweight implementation of BAM (Business Analysis Modeler). Interactive Reports do not need an Analytic Logic server or a separate database to store data. Interactive Reports are dynamic and interactive analytic reports. You can move data elements around on a report and view it using different dimensions in realtime. The ability to view reports at different angles, gives you realtime 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.

Interactive Reports can be saved, exported to Microsoft Excel, or printed 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 BAM reports.

Launching and Working with Interactive Reports

Interactive Reports use events and workflow to capture response and restore times. If the events 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, a number of predefined queries are executed and used to display the data that the system has captured.

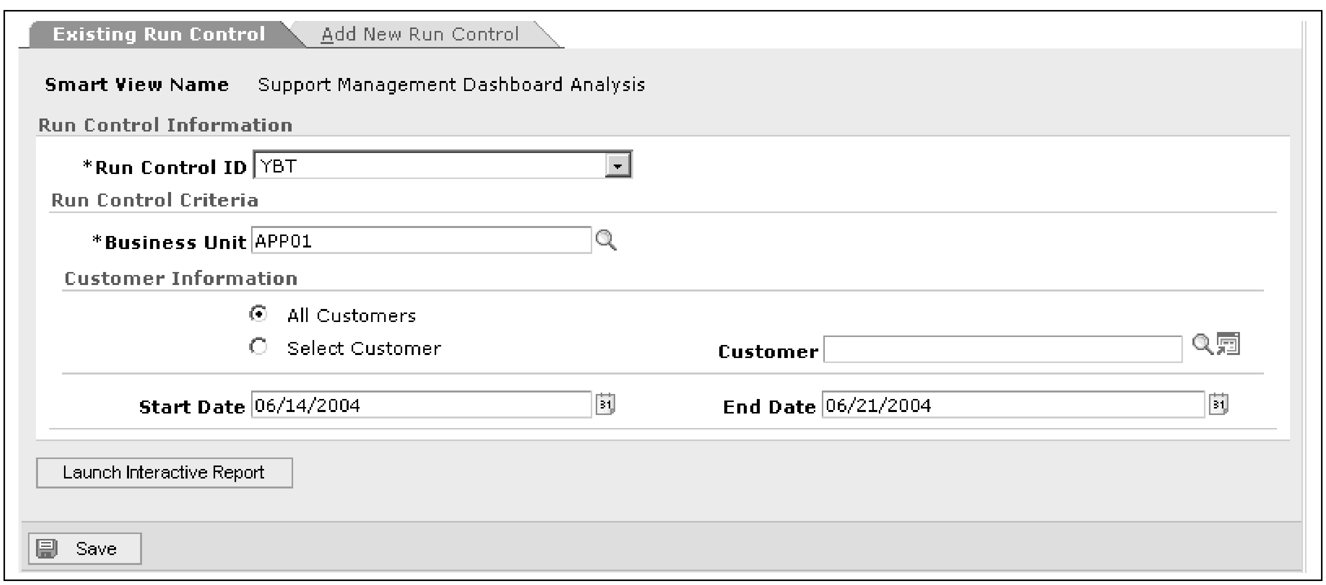
Because the events and workflow are already activated when you install the system, there are no setup or configuration procedures to follow before you access the pages you will use to launch Interactive Reports.

Pages Used to Launch Interactive Reports

Page Name	Object Name	Navigation	Usage
Support Management Dashboard Analysis	RC_SUP_MUPD	Support, Interactive Report, Support Dashboard	Track the number of cases opened, cases closed, cancelled cases, return materials, and service orders.
Service-Level Management Analysis	RC_SUP_SADD	Support, Interactive Report, Service-Level Management	Track the total number of cases, agreements, warranties, response on time, response late, and restore on time, restore late, and suspension.
HelpDesk Service-Level Management Analysis	RC_HD_SADD	HelpDesk, Interactive Report, Service-Level Management	Track the number of cases , agreement, response on time, response late, restore on time, restore late, and suspension.
Change Metrics Update	RG_CHG_METRIX_BAM	HelpDesk, Interactive Report, Change Request Metrics	Track the number of requests opened.
Forward Schedule	RG_CHG_METRIX_BAM	HelpDesk, Interactive Report, Forward Schedule of Changes	##

Running the Support Management Dashboard Analysis Interactive Report

Access the Support Management Dashboard Analysis launch page.



Support Management Dashboard Analysis run control page

Run Control ID Select from the list of run control IDs. These IDs identify a set of saved report parameters from previous runs and allow you to save time and reduce mistakes. Use the Add New Run Control tab to generate reports when you don’t have a run with the desired business unit, customer, or date range.

Business Unit Select the business unit for which you want to launch the Interactive Report. This is a required field.

All Customers Select to launch the Interactive Report for all customers of the given 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.

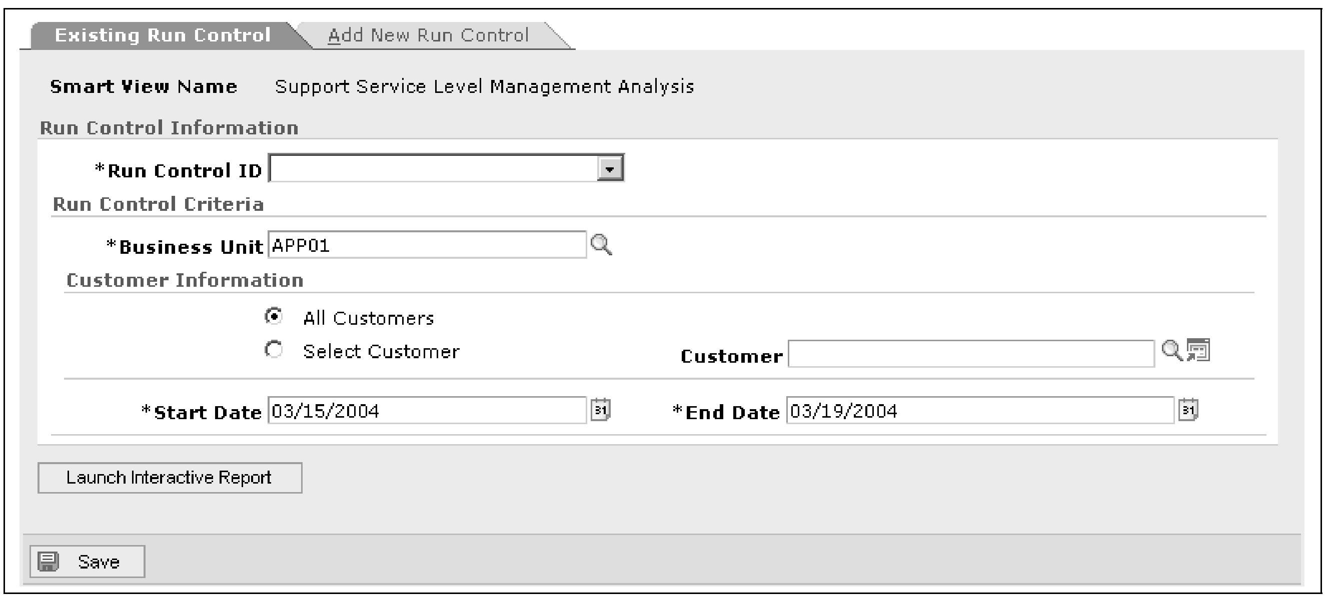
Start Date Select the first date from which you want to view data for the Interactive Report. This is a required field.

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.

Running the Service-Level Management Analysis Interactive Report

Access the Service-Level Management Analysis page.



Service-Level Management Analysis run control page

Run Control ID Select from the list of run control IDs. These IDs identify a set of saved report parameters from previous runs and allow 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.

All Customers Select to launch the Interactive Report for all customers of a given 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.

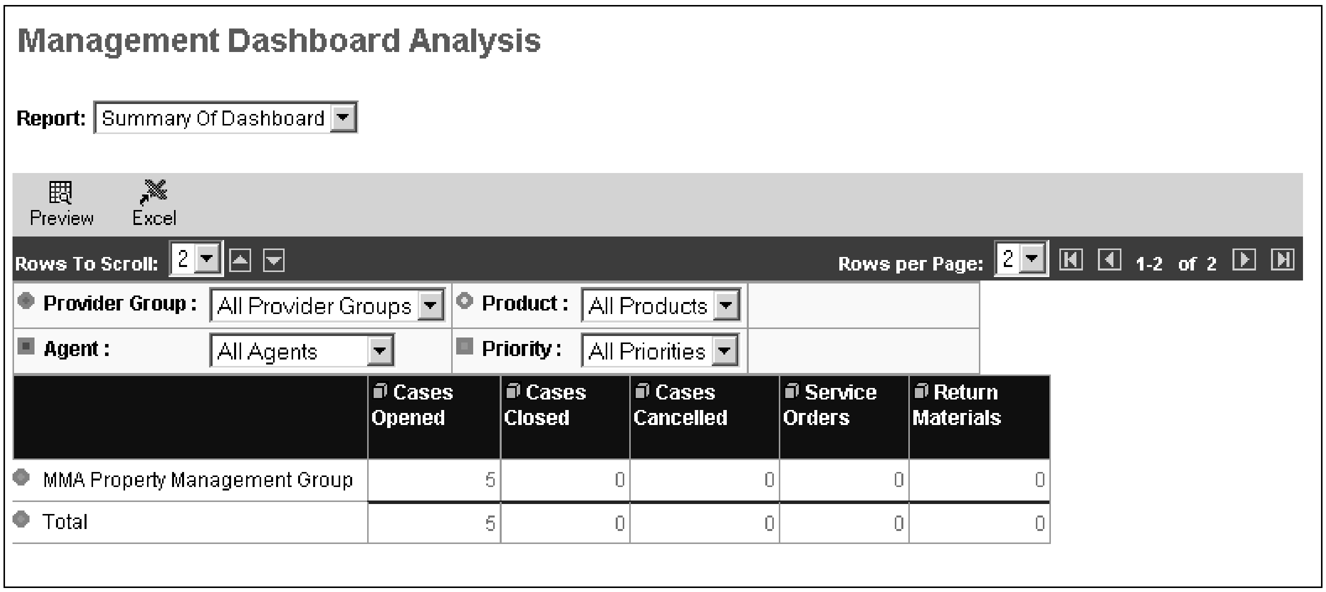
Start Date Select the first date from which you want to view data for the Interactive Report. This is a required field.

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.

Viewing the Management Dashboard Analysis Interactive Report

Launch the Management Dashboard Analysis Interactive Report.



Management Dashboard Analysis Interactive Report

Usage

Track the number of cases opened, cases closed, cancelled cases, return materials, and service orders.

Parameters

Access the Support Management Dashboard Analysis launch page and use the following run control criteria to refine your Interactive Report result.

- Business unit
- Customer
- Start and end dates

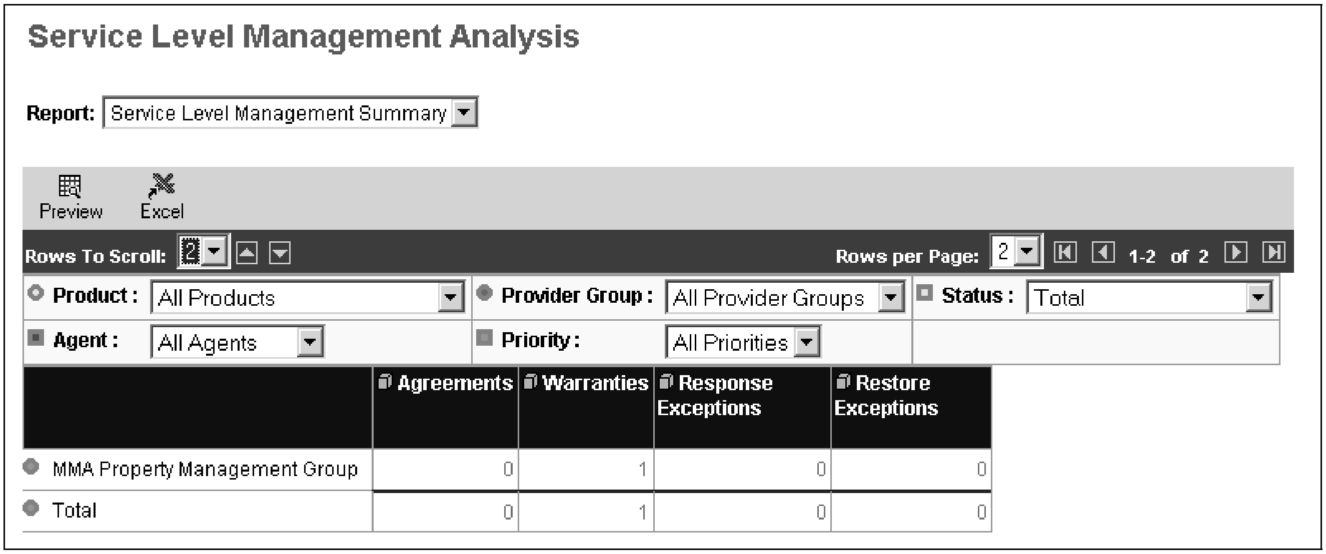
Available Dimensions

Use the following dimensions to rearrange data and look at the analysis with different perspectives:

- Provider Group
- Product
- Agent
- Priority

Viewing the Service-Level Management Analysis Interactive Report

Launch the Service-Level Management Analysis Interactive Report.



Service-Level Management Analysis Interactive Report

Usage

Track the total number of cases, agreements, warranties, suspension, response on time, late, and restore on time, late.

Parameters

Access the Service-Level Management Analysis launch page and use the following run control criteria to refine your Interactive Report result.

- Business unit
- Customer
- Start and end dates

Available Dimensions

Use the following dimensions to rearrange data and look at the analysis from different perspectives:

- Provider Group
- Product
- Agent
- Priority
- Customer
- Status
- Status Category

APPENDIX C

PeopleSoft CRM Call Center Reports

This appendix provides an overview of PeopleSoft Support and PeopleSoft HelpDesk reports and enables you to view summary tables of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with your documentation.

See Also

PeopleSoft Process Scheduler

Using PeopleSoft Applications

PeopleSoft CRM Call Center Reports: A to Z

These tables list the PeopleSoft Support and PeopleSoft HelpDesk reports, sorted alphanumerically by report ID.

This section discusses:

- PeopleSoft HelpDesk case reports.

  Except for report *RCC2009*, all HelpDesk-specific report IDs start with *RCC1*

- PeopleSoft Support case reports.

  All Support-specific report IDs start with *RCC2*.

- Solution reports (shared by both applications).

  Solution report IDs start with *RCC2.*

All reports in this appendix are Crystal reports.

Note. 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 Case 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 Case 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 Agent, HelpDesk Case By Department	RUN_RCC1003
RCC1004 HelpDesk Case 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 Agent, HelpDesk Case By Priority	RUN_RCC1004
RCC1005 HelpDesk Case By Problem 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 Agent, HelpDesk Case By Problem Type	RUN_RCC1005
RCC1006 HelpDesk Case By Status	This report lists case statuses and gives the number of cases with each status.	HelpDesk, Reports, Case By Agent, HelpDesk Case By Status	RUN_RCC1006
RCC1007 HelpDesk Case By Category/Type/Detail	This report groups cases by category and gives 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 Agent, HelpDesk Case By Ctg/Type/Dtl	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 Case 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	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 lists show the case ID, priority, date opened, date closed, and days to close.	HelpDesk, Reports, Time To Close By Agnt, HelpDesk Time To Close By Agent	RUN_RCC1010
RCC1011 HelpDesk Case By Employee	This report lists employees who have reported cases. For each employee, the report shows the number of cases opened.	HelpDesk, Reports, HelpDesk Case By Employee	RUN_RCC1011
RCC1012 HelpDesk Case 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 Project	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 Statistics	This report provides the following statistics for agreements used during a specified date range: the number of cases opened, the number of cases closed, and the average time to close in days and in hours.	Support, Reports, Agreement Statistics, Agreement Statistics	RUN_RCC2000
RCC2001 Case Information	This report provides detailed information for cases, including most of the data shown in the case component.	Support, Reports, Support Case Information	RUN_RCC2001
RCC2002 Cases by Age	This report categorizes cases by creation date and then by customer. For each case, the report shows the case ID, priority, status, case type, contact name, assigned to agent, and subject.	Support, Reports, Cases By Age	RUN_RCC2002
RCC2003 Cases by Agent	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	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, Cses 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, 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	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	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 event be activated in the Case History Active Analytics Framework definition.	Support, Reports, Cases Reopened	RUN_RCC2008
RCC2013 Support Agreement Dates	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	RUN_RCC2013

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework”

Solution Reports

Report ID and Report Name	Description	Navigation	Run Control Page
RCC2012 Solution Usage	This report lists solutions that were used in cases created during the specified date range. For each solution, the report shows the solution usage count, solved count, and success rate.	Solutions, Reports, Solutions, Solution Usage	RUN_RCC2012
RCC2014 Top Ten Solutions by Product	For each included product, this report lists the ten solutions that most often resolved cases that were created during the specified date range. For each solution, the report shows the number of cases solved for that product.	Solutions, Reports, Top Solutions, Top Ten Solutions by Product	RUN_RCC2014

APPENDIX D

ISO Country and Currency Codes

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

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement — In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule — In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account — A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist — Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan — In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule — In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class — An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair — In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server — A server that is set up to verify users of the system.

base time period — In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job — In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book — In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch — A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only — An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check — In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control — In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period — The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event — In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit — A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer — In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

catalog item — In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map — In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner — In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization — Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

channel — In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField — A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing — You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit — The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey — One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook — In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

Class ChartField — A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone — In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection — To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception — In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing — In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact — In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

forecast item — A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund — In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

generic process type — In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

group — In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object — In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule — In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur — In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

item — In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

KPI — An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

	laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person’s role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account — Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step — In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level — In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier — A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField — You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger — An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period — In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree — A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate — To distribute a production version of the enterprise catalog to partners.

system function — In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet — A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing — Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency — The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template — A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory — In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan — A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

user interaction object In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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