PeopleSoft 8 CRM Portal Pack PeopleBook

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Contents

About This PeopleBook

The book provides you with the information that you need to implement and use PeopleSoft CRM Portal Pack. You can order the online version by requesting SKU CRMB8R0 or the print version by requesting SKU CRMr8CPPK-B 0601.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft *Customer Relationship Management* product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating through the system and adding, updating, and deleting information 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.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (**www.peoplesoft.com**). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: **http://www.peoplesoft.com/.**

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of 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 delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8 Customer Relationship Management PeopleBooks,* SKU CRMB8R0.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: **http://www.peoplesoft.com/**.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not 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 W.
Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8 Projects PeopleBook,* "Integrating With PeopleSoft Billing and PeopleSoft Contracts." • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see "Securing Your PeopleSoft Contracts System." • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates **For more information** cross-references to related or additional information.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, 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 comments by email to the authors of PeopleSoft documentation at:

DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 2

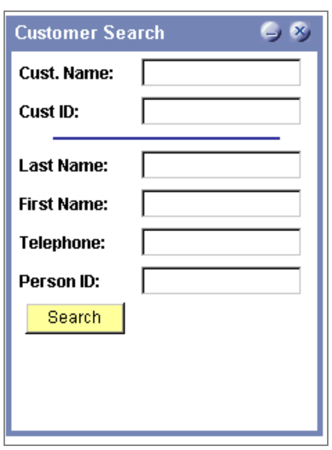
PeopleSoft CRM Interaction Management Pagelets

The PeopleSoft CRM Interaction Management pagelets enable you to get a 360-degree view of a customer from your portal home page. They provide instant access to the customer's information, such as records of recent interactions, open support cases, or active service orders.

The key to using the Interaction Management pagelets is the Customer Search pagelet. Once you select a customer using this pagelet, the rest of the Interaction Management pagelets display the latest information about the selected customer.

Using the Customer Search Pagelet

Usage	Use the Customer Search pagelet to access customer interaction information on PeopleSoft CRM Interaction Management interaction pagelets.
Pagelet Name	RI_SEARCH_PGT_GBL
Enabling Application	PeopleSoft CRM Interaction Management



Customer Search pagelet

You can enter any of the following parameters to search for a customer:

Cust. Name (customer name)	Name of a customer.
Cust ID (customer ID)	Code that identifies a customer.
Last Name	Last name of a person defined as a contact for a customer.
First Name	First name of a person defined as a contact for a customer.
Telephone	Telephone number of a person defined as a contact for a customer.
Person ID	Code that uniquely identifies a person defined as a contact for a customer.
Search	Push the **Search** button to initiate a search.

Search Tips

The PeopleSoft CRM Interaction Management search pagelet functions differently than standard PeopleSoft search pages, as described in this section.

Search Pagelet Sections

The PeopleSoft CRM Interaction Management search pagelet is divided into two sections: top and bottom.

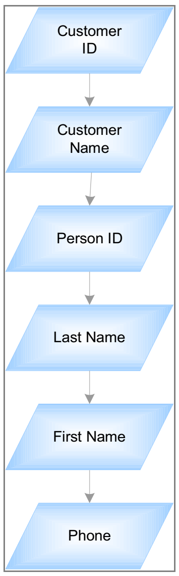
You use the top section—which includes the fields Customer ID and Customer Name—to focus your search on customers. When you enter search parameters in the top section, the system returns customer names exclusively.

You use the bottom section—which includes the fields Last Name, First Name, and Telephone, and Person ID—to focus on persons. When you enter search parameters *only* in the bottom section, the system returns person names as well as customer names. When you enter search parameters in the Telephone field, and none in the top section, the system returns telephone numbers as well as customer and person names.

Parameters Entered	***Results Displayed***
Customer ID and/or Customer Name	Customers
Last Name, First Name, and/or Person ID	Customers and persons
Telephone	Telephone numbers, customers, and persons
Telephone and any of the following fields: Last Name, First Name, Person ID	Telephone numbers, customers, and persons

Search Hierarchy

The system recognizes search parameters hierarchically, starting from the top section and moving down to the bottom section, in the field order shown in the diagram below. For example, if you enter valid parameters in the Customer ID field–the topmost field in the hierarchy–the system searches for customers that meet those criteria, and ignores any other parameters you enter in the other, hierarchically lower fields. Therefore, if you want to search by customer name, do not enter a value in the Customer ID field, which is higher in the hierarchy. Likewise, if you want to search by customer phone number, do not enter a value in the Person ID field, nor in any other field above the Phone field in the hierarchy.



Search hierarchy

Using Wildcards

You can standard wildcards in your search parameters. Some wildcards are entered by default:

Fields	*Default Wildcard*	*Default Wildcard Effect*
Customer ID **Person ID** **Customer Name** **Last Name** **First Name** **Phone**	System appends a wildcard to the end of the string that you enter.	System assumes that one or more characters may follow the string that you enter. No characters are assumed to occur before or within the string. For example, if you entered *92,* your search results might include *925-555-1212 or 927-5432.* Your search results would not include *592-4317* or *902-983-2893.*

Note. You can manually insert wildcards. However, this is usually unnecessary, because the system inserts default wildcards, as described in the preceding table.

The Other Pagelets

Once you have selected a customer using the Customer Search pagelet, the rest of the pagelets display information related to that customer. This section describes the pagelets, in alphabetical order.

Add New Lead Pagelet

Usage	The Add Lead pagelet provides a link for adding a new sales lead.
Pagelet Name	RI_PE_ADD_LEAD_GBL
Enabling Application	PeopleSoft CRM Interaction Management and PeopleSoft CRM Sales

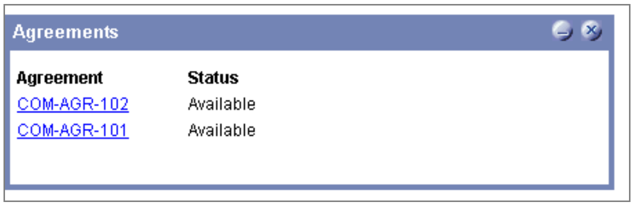
Add New Lead pagelet

If you have both PeopleSoft CRM Interaction Management and PeopleSoft CRM Sales, click the Add a New Sales Lead link to go to the Sales Lead Details page.

For more information about adding leads, see Managing Leads in the *PeopleSoft CRM Sales PeopleBook.*

Agreements Pagelet

Usage	The Agreements pagelet displays the agreements in force for the current customer.
Pagelet Name	RI_PE_AGREEMENT_GBL
Enabling Application	PeopleSoft CRM Interaction Management



Agreements pagelet

Agreements define the types of services a customer is entitled to. This pagelet displays the agreements currently in force for the selected customer. The **Status** column indicates whether the agreement is *Available*, meaning it is in effect for covering services.

Click the **Agreement** name to go to the Agreements component for details about the agreement.

For more information about agreements, see Setting Up and Managing Agreements and Warranties in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

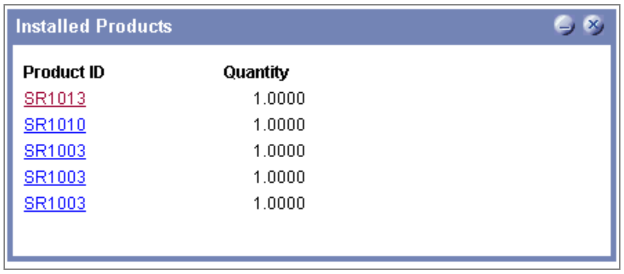
Customer Information Pagelet

Usage	The Customer Information pagelet displays the name and ID of the current customer, whose data appears in the other customer-oriented pagelets.
Pagelet Name	RI_PE_CUST_GBL
Enabling Application	PeopleSoft CRM Interaction Management

Customer Information pagelet

Installed Products Pagelet

Usage	The Installed Products pagelet displays the products that the current customer has.
Pagelet Name	RI_PE_PROD_GBL
Enabling Application	PeopleSoft CRM Interaction Management



Installed Products pagelet

Installed products are products that the customer has purchased and installed. In PeopleSoft CRM Support and PeopleSoft CRM FieldService, installed products records can be used to limit agreement lines to a specific set of products and to determine whether a warranty is in effect for an installed product referenced on a case or service order.

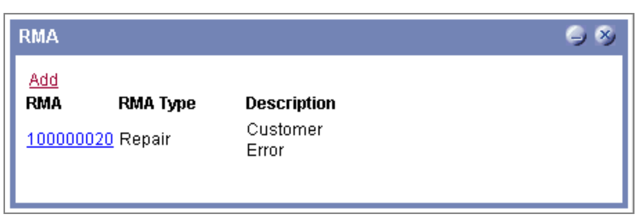
Product ID	The identification of the product installed at the customer site
Quantity	The quantity of the item installed

Click the **Product ID** to go to the Installed Product page and see details about the installed product.

For more information about installed products, see Tracking Installed Products in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

RMA Pagelet

Usage	The RMA pagelet displays active return material authorizations for the current customer.
Pagelet Name	RI_PE_RMA_GBL
Enabling Application	PeopleSoft CRM Interaction Management and PeopleSoft CRM Support



RMA pagelet

If PeopleSoft CRM Support is integrated with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, call center agents can generate return material authorizations (RMAs) for customers returning stock for replacement or repair or returning stock that was shipped in error. This pagelet displays information about any active RMAs and enables you to create a new RMA.

The **RMA Type** field indicates the type of RMA processing for the returned material. The options are:

- ***Advanced Exchange:*** Immediately create a replacement order for the item that the customer is returning. The replacement order can be for the same item or for different items.
- ***Repair and Return:*** The customer is returning an item for repair.
- ***Return and Replace:*** The customer is returning an item that must be received before a replacement order can be created.
- ***Return to Stock:*** The customer is returning material with no need for a replacement.

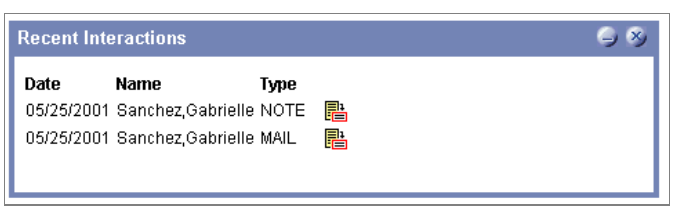
Click the **RMA** number to go to the RMA form and see details about the RMA. To create a new RMA, click the **Add** button.

Note. The customer must have a Sold To address defined in order to add an RMA.

For more information about RMAs, see Managing Material Returns in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.*

Recent Interactions Pagelet

Usage	The Recent Interactions pagelet lists the most recent interactions you have had with contacts from the current customer.
Pagelet Name	RI_PE_REC_INT_GBL
Enabling Application	PeopleSoft CRM Interaction Management



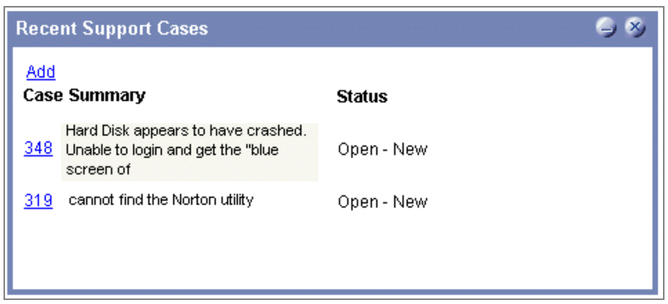
Recent Interactions pagelet

PeopleSoft CRM Interaction Management enables you to track each time you make contact with a customer. The Recent Interactions pagelet displays key information about the most recent interactions: the date of the interaction, the name of the customer contact, and the type of interaction. If you need more information about one of the interactions, click the drill-down icon to go to the Interactions page.

For more information about interactions, see the PeopleSoft CRM Interaction Management PeopleBook.

Recent Support Cases Pagelet

Usage	The Recent Support Cases pagelet displays information about recent cases the customer has opened.
Pagelet Name	RI_PE_SUPPORT_GBL
Enabling Application	PeopleSoft CRM Interaction Management and PeopleSoft CRM Support



Recent Support Cases pagelet

The **Case** (case number) and **Summary** identify the case.

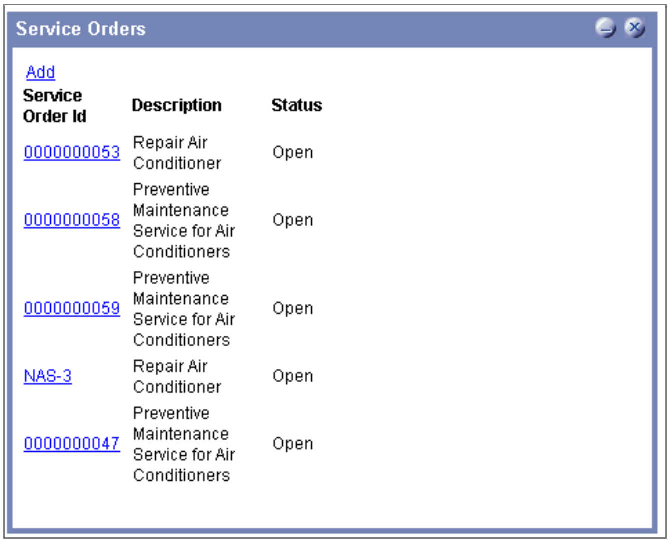
The **Status** provides the current case status. When your organization defines valid case statuses, each status is classified as *open, closed,* or *canceled.* Only cases with an open status appear in the Recent Support Cases pagelet.

Clicking a case number displays detailed case information in the Problem Report page. Clicking **Add** enables you to open a new case for this customer.

For more information about cases, see Managing Cases in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.*

Service Orders Pagelet

Usage	The Service Orders pagelet displays information about active service orders for the current customer.
Pagelet Name	RI_PE_SO_GBL
Enabling Application	PeopleSoft CRM Interaction Management and PeopleSoft CRM FieldService



Service Orders pagelet

A service order records a request for one of the services provided by your company. The **Status** field indicates the current state of the service order as a whole. The available values are:

Open	The service request is still in process and has not been completed. This is the initial status of a new service order.
Completed	The service request has been finished, but not all of the time, expense, and material information has been entered.
Closed	The service request has been finished and all time, expense, and material information has been entered.
Canceled	The service request has been canceled.

To get more detailed information about a service order, click the **Service Order ID**. To create a new service order, click the **Add** button.

For more information about support cases, see Creating and Managing Service Orders in the *PeopleSoft CRM FieldService PeopleBook.*

CHAPTER 3

Employee-Oriented Pagelets

The PeopleSoft CRM Interaction Management pagelets described in the previous chapter display information relevant to a selected customer. The pagelets described in this chapter display information relevant to *you*.

CRM Worklists

A worklist is a collection of notifications that have been sent to you by other users much like email messages that are sent to an inbox. Worklists are organized to group all of the different kinds of actions that are associated with your job such as notifications, service orders, support cases, and so on. From a worklist, you can link to the component pages that are related to the work without having to search through your system.

CRM Worklist Pagelet

Usage	The CRM Worklist pagelets provides summary information about all items on your personal worklist. This page also provides links enabling you to view additional details about the work, to perform the indicated work, and to reassign work items
Pagelet Name	RC_PE_WRKLST_GBL

CRM Worklist pagelet

To view the underlying target page, click the link in the first column, which lists your worklist items. The system navigates you to the service order or notification page where you can perform your task or read the message text of the notification. If there is a message attached to the notification, a mail icon appears next to the link; click the icon to read the mail message.

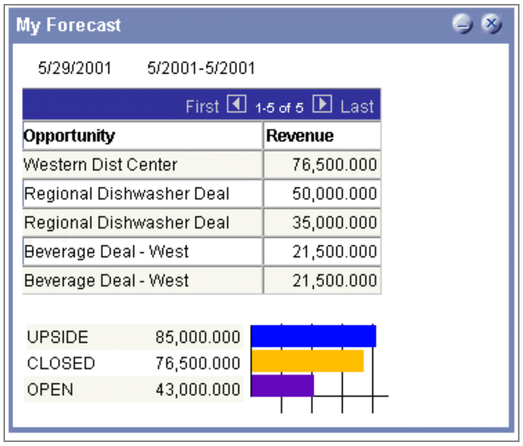
For more information about using worklists, see Using Worklists and Notifications in the *PeopleSoft CRM Application Fundamentals PeopleBook.*

PeopleSoft CRM Sales Pagelets

PeopleSoft CRM Sales offers several pagelets to give sales representatives an overview of their sales activities. There are pagelets for each of the major sales objects—leads, opportunities, and forecasts—plus pagelets for managing your sales activities.

My Forecast Pagelet

Usage	The My Forecast pagelet shows a financial snapshot of your sales opportunities.
Pagelet Name	RSF_PRTL_REP_FCAST_GBL
Enabling Application	PeopleSoft CRM Sales



My Forecast pagelet

The dates at the top of the pagelet indicate the as-of date for the forecast and the period that the forecast covers.

The table lists your opportunities and the expected revenue from each one. The graph shows the cumulative totals in each forecasting category.

For more information about forecasting and opportunities, see Managing Opportunities and Forecasting in the *PeopleSoft CRM Sales PeopleBook*.

My Leads Pagelet

Usage	The My Leads pagelet lists leads for which you have an upcoming task.
Pagelet Name	RSF_PRTL_LEADS_GBL
Enabling Application	PeopleSoft CRM Sales

My Leads pagelet

This pagelet lists those leads that will soon require your attention. The **Next Task Date** column shows when the next scheduled action is.

To get more detail about an lead, including information about the scheduled tasks, click the lead to go to the Sales Lead Details page.

For more information about leads, see Managing Leads in the *PeopleSoft CRM Sales PeopleBook*.

My Monthly Calendar Pagelet

Usage	The My Monthly Calendar pagelet gives you quick access to your calendar for this month.
Pagelet Name	RSF_PRTL_CAL_MTH_GBL
Enabling Application	PeopleSoft CRM Sales

My Monthly Calendar pagelet

My Opportunities Pagelet

Usage	The My Opportunities pagelet lists opportunities for which you have an upcoming task.
Pagelet Name	RSF_PRTL_OPP_GBL
Enabling Application	PeopleSoft CRM Sales

My Opportunities

Opportunity	Contact	Telephone	Status	Next Task Date
Refrigerators Freezers for cafe	Anderson,Nichole	503 2390838	Open	06/29/2001
information request	Rodrigez,Robert	760 3255664	Open	06/20/2001
Regional Dishwasher Deal	Lewis,Savannah	345234518	Open	06/01/2001

My Opportunities pagelet

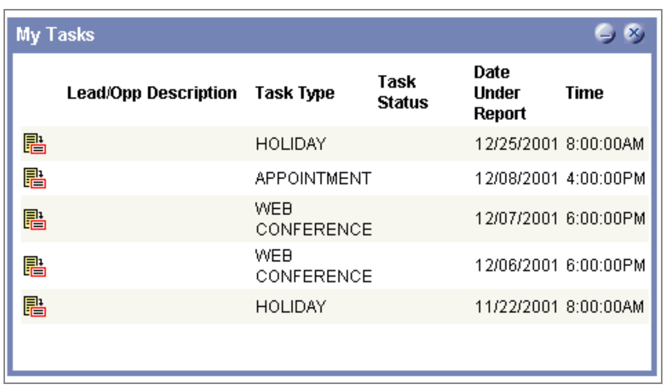
This pagelet lists those opportunities that will soon require your attention. The **Next Task Date** column shows when the next scheduled action is.

To get more detail about an opportunity, including information about the scheduled tasks, click the link in the **Opportunity** column to go to the Opportunity Detail page.

For more information about opportunities, see Managing Opportunities in the *PeopleSoft CRM Sales PeopleBook*.

My Tasks Pagelet

Usage	The My Tasks pagelet lists upcoming tasks from your calendar.
Pagelet Name	RSF_PRTL_ACTLIST_GBL
Enabling Application	PeopleSoft CRM Sales



My Tasks

	Lead/Opp Description	Task Type	Task Status	Date Under Report	Time
		HOLIDAY		12/25/2001	8:00:00AM
		APPOINTMENT		12/08/2001	4:00:00PM
		WEB CONFERENCE		12/07/2001	6:00:00PM
		WEB CONFERENCE		12/06/2001	6:00:00PM
		HOLIDAY		11/22/2001	8:00:00AM

My Tasks pagelet

To see the details about a task, click the drill-down icon in the first column.

Call Center Pagelets

PeopleSoft CRM HelpDesk enables the Recent Help Desk Cases pagelet, which displays an employee's most recent cases. The pagelet displays summary information about each case and provides links to pages where employees can review existing cases and report new cases.

Note. PeopleSoft CRM Support provides a similar pagelet. Because the Recent Support Cases pagelet is used by your customers, it is delivered with PeopleSoft Customer Portal rather than as part of the PeopleSoft CRM Portal Pack.

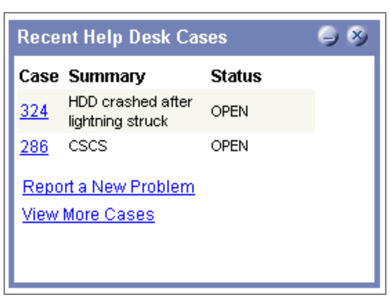
For more information about the Recent Support Cases pagelet, see Understanding PeopleSoft Customer Portal Elements in the *PeopleSoft Customer Portal PeopleBook.*

In addition to the Recent Help Desk Cases pagelet, PeopleSoft CRM Support and PeopleSoft CRM HelpDesk provide several portal pagelets that give call center managers valuable snapshots of their call center operations.

For more information about the manager-oriented call center pagelets, see the next chapter, Using the Manager Dashboard.

Recent Help Desk Cases Pagelet

Usage	The Recent Help Desk Cases pagelet displays employee's open cases. The pagelet displays the five most recently opened (and still open) cases. The pagelet has a slightly different appearance depending on whether you place it in a narrow column or a wide column.
Pagelet Name	RC_SS_HD, RC_SS_HDW
Role(s)	Any employee
Enabling Application	PeopleSoft CRM HelpDesk



Recent Help Desk Cases pagelet

The **Case** (case number) and **Summary** identify the case.

The **Status** provides the current case status. When your organization defines valid case statuses, each status is classified as *open, closed,* or *canceled.* Only cases with an open status appear in the Recent Help Desk Cases pagelet.

Clicking a case number displays detailed case information in the Problem Report page. The Problem Report page enables users to search for solutions, review case history, review and create case notes, and to change contact information for that case.

Clicking the **Report a New Problem** displays the Report a Problem page, where users can describe a new problem, look for solutions to the problem, and ask that someone contact them about the problem.

Clicking the **View More Cases** link displays the Review Existing Cases page, where users can search for other cases (including closed cases) and display those cases in the Problem Report page.

For more information about cases, see Managing Cases in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.*

CHAPTER 4

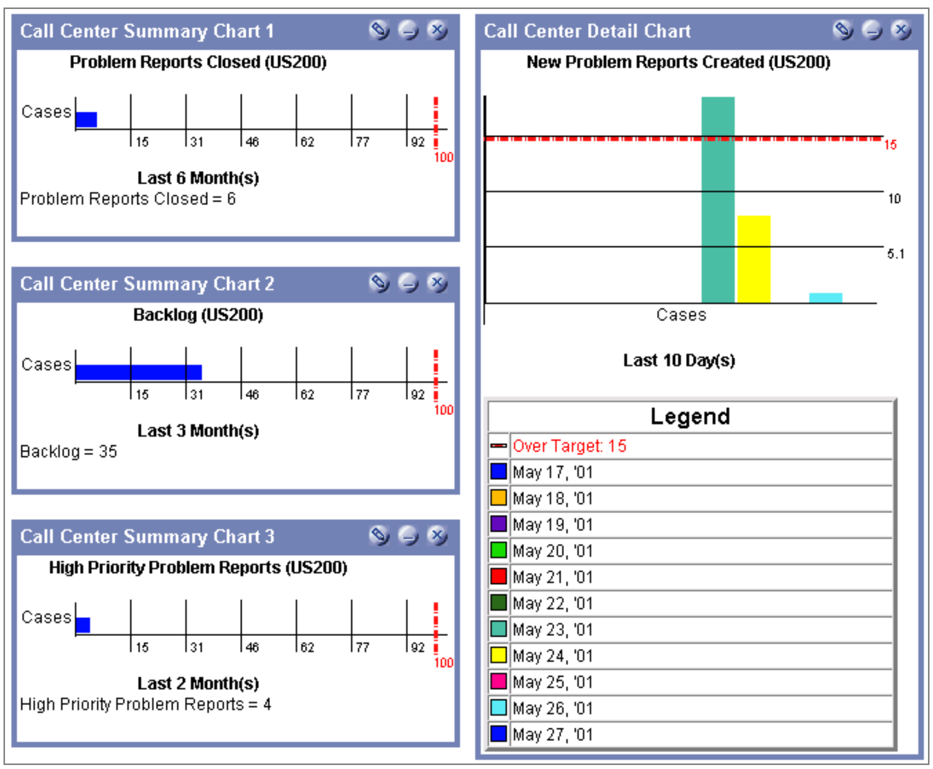
Using the Manager Dashboard

PeopleSoft CRM Support and PeopleSoft CRM HelpDesk provide several portal pagelets that give call center managers valuable snapshots of their call center operations. By incorporating these pagelets into a portal, a call center manager can build a personalized manager dashboard.

Setting Up the Manager Dashboard

To turn your portal home page into a full-powered manager dashboard, you can add up to four separate charts to your portal homepage.

You can set up three summary charts, which display totals over a specified time period, and one detail chart, which displays subtotals over specified increments of time.



Manager dashboard pagelets

Positioning your mouse over chart (over the bar representing the charted data) to see pop-up text that describes the type of data being charted and the number of cases represented.

To add these charts to your home page, simply personalize the home page content to include Call Center Summary Charts 1–3 and the Call Center Detail Chart.

For more information about personalizing your portal layout and content, see xref.

Delivered Charts

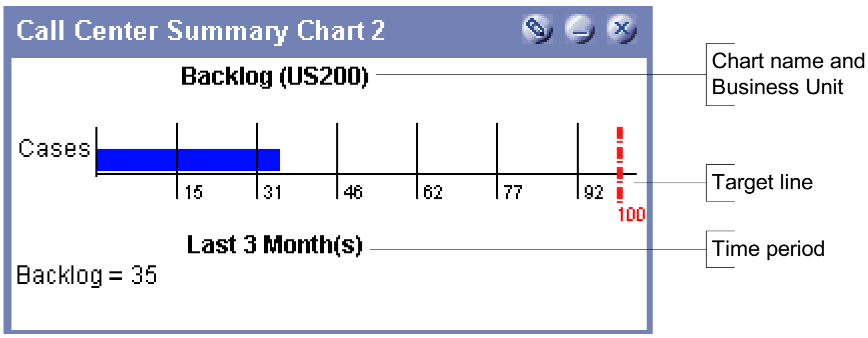
PeopleSoft gives you seven charts that you can display in your manager dashboard pagelets.

Chart Name	***Description***
Backlog	The number of new cases created during the specified time period minus the number of cases closed during the specified time period. This is determined based on the Date Created and Date Closed fields in the case. Note that this may be a negative number if more cases are closed than created.
High Priority Problem Reports	The number of high priority cases created during the specified time period. This is determined based on the Priority field in the case. (All priorities are associated with one of three priority types: *high, medium*, or *low*.) Cases are counted regardless of the current status, so this chart might include high priority cases that have been closed. The priority is evaluated at the time the chart fetches the data; cases where the priority has changed from *high* to another value are not included in the count.
New Problem Reports Created	The number of cases created during the specified time period. This is determined based on the Date Created field in the case.
First Call Resolutions	The number of cases closed on the first call during a specified time period. This is determined based on the Resolved by First Contact field in the case.
Problem Reports Closed	The number of cases closed during the specified time period. This is determined based on the Date Closed field. (All statuses are associated with one of three status categories: *open, closed,* or *cancelled.*)
Links to Resolutions	The number of new cases that are resolved. Cases are considered resolved if they are associated with a solution and the solution status is *Resolution Successful.* This chart does not distinguish between cases that are resolved with predefined solutions and cases that are resolved with independent text solutions. This chart differs from the Problem Reports Closed chart because resolving a case does not necessarily close the case.
Percent Links to Resolutions	The number of cases resolved divided by the number of new cases created during a specified time period. This is determined using the same criteria as the New Problem Reports Created and the Links to Resolutions charts.

For more information about cases, see Managing Cases in the *PeopleSoft CRM Support and PeopleSoft CRM HelpDesk PeopleBook.*

Using Summary Charts

Summary charts display the total number of cases (or, for the Percent Links to Resolutions chart, the percentage of cases) that fit the chart's criteria over a specified time period. When you configure the chart, you'll choose both the time period covered by the chart and a target number against which the total amount is measured.



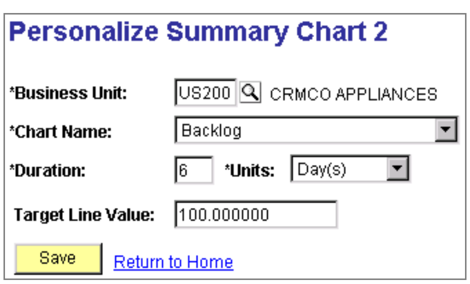
Summary chart

To configure a summary chart:

1. Click the pagelet's **Customize** button.

Customize button

The Personalize Summary Chart page appears.



Customize Summary Chart page

2. Enter your Business Unit.

Only cases associated with this business unit will be included in the system's calculation of the chart data.

3. Select a Chart Name.

   PeopleSoft provides seven different charts from which to choose.

For more information and a list of available charts, see Delivered Charts in this chapter.

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4. Enter a time period.

   In the **Duration** and **Units** fields, select the number of ***Days, Hours, Months,*** or ***Weeks*** to be included in the chart data.

   You can show up to 24 hours, 31 days, 7 weeks, or 13 months of data.

5. Enter a Target Line Value.

   All of the summary charts show either the number of cases or the percentage of cases that fit the specified criteria. When this number is charted, you need to have a target line in order to provide a sense of scale. For example, if the target line for your backlog chart is one hundred, the chart graphically illustrates how close you are to that target.

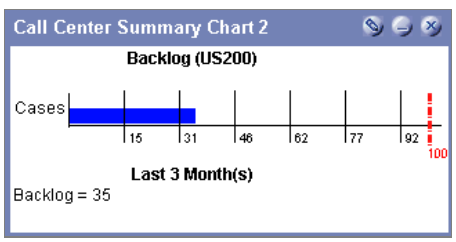


Chart measuring backlogged cases against a target of one hundred

   If you do not enter a target line value, you can still see the number (or percentage) of cases that meet the criteria, but you no longer get a visual representation of how that that number compares to a target value. Instead, the system assumes that the actual number is also the target number.

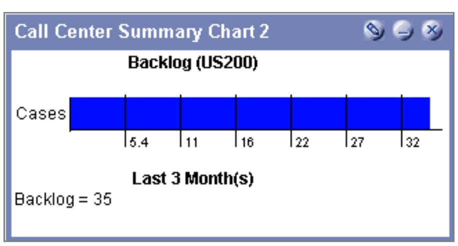


Chart with no target line

6. Click **Save.**

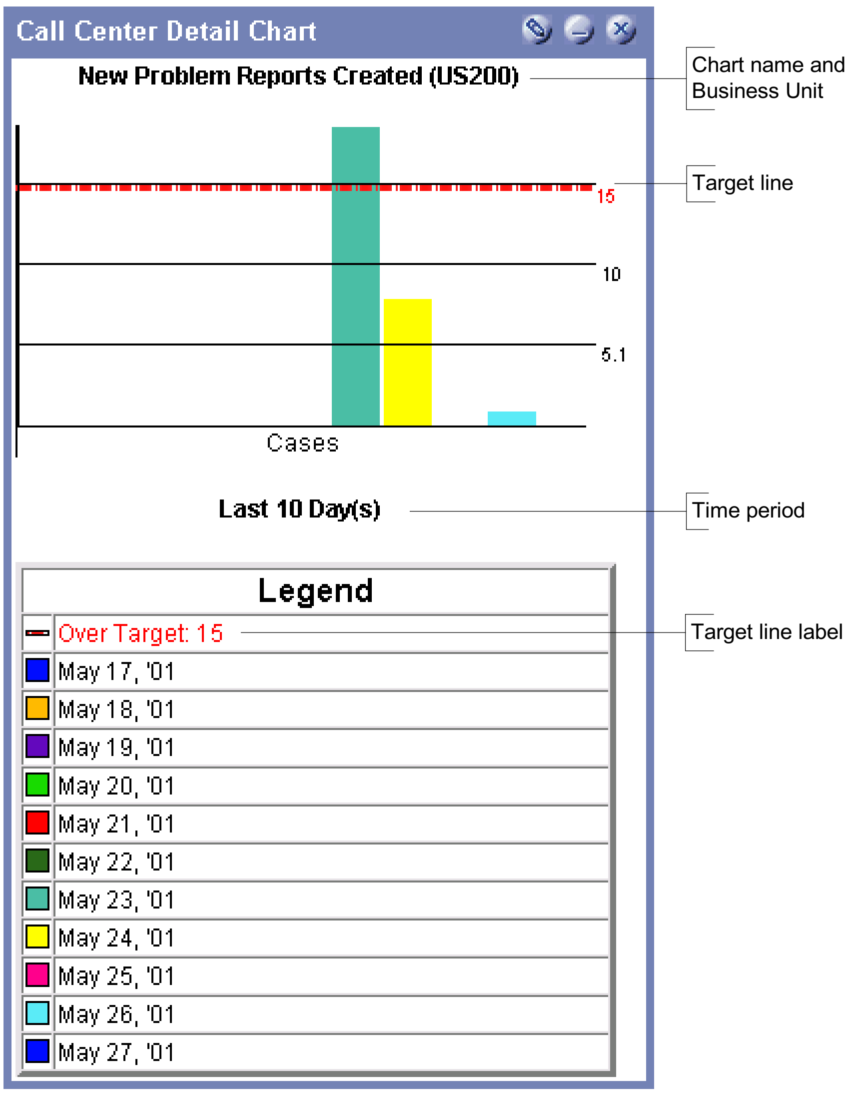
7. Click **OK.**

Your new settings are now in effect.

Using the Detail Chart

Like the summary charts, the detail chart displays the total number (or percentage) of cases that fit the chart's criteria over a specified time period. In addition, the detail chart provides a breakdown of the data over the time period. For example, if you set up the chart to show data over a certain number of weeks, then the detail chart provides both a total number for that time period and a week-by-week breakdown of the numbers.

When you configure the chart, you'll choose the time period covered by the chart, a target number against which the total amount is measured, and a target line label that appears in the legend. You also have several options for configuring the legend.



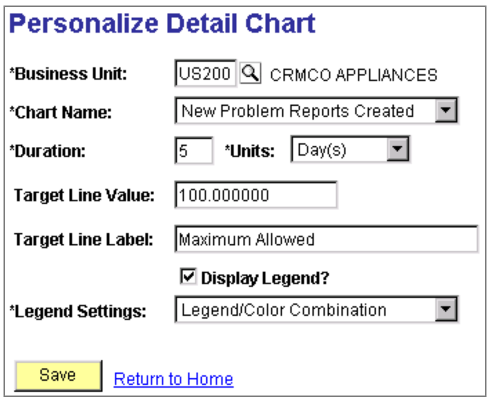
Detail chart

To configure the detail chart:

1. Click the pagelet's **Customize** button.

Customize button

The Customize Detail Chart page appears.



Customize Detail Chart page

2. Enter your Business Unit.

   Only cases associated with this business unit will be included in the system's calculation of the chart data.

3. Select a Chart Name.

   PeopleSoft provides seven different charts from which to choose.

For more information and a list of available charts, see Delivered Charts in this chapter.

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4. Enter a time period.

   In the **Duration** and **Units** fields, select the number of ***Days, Hours, Months,*** or ***Weeks*** to be included in the chart data.

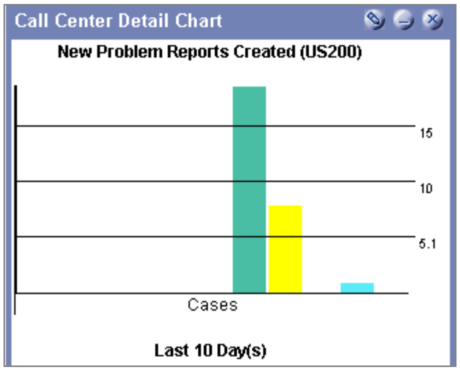
   You can show up to 24 hours, 31 days, 7 weeks, or 13 months of data.

   Remember that the detail chart provides a breakdown of the data over the specified time period. The breakdown is based on the specified units of time. For example, if you set up the chart to show data over a certain number of weeks, then the detail chart provides a week-by-week breakdown of the numbers.

5. Enter a Target Line Value.

The detail charts show the number (or percentage) of cases that fit the specified criteria. Enter the target against which the totals are to be charted. The target line provides a sense of scale to the numbers.

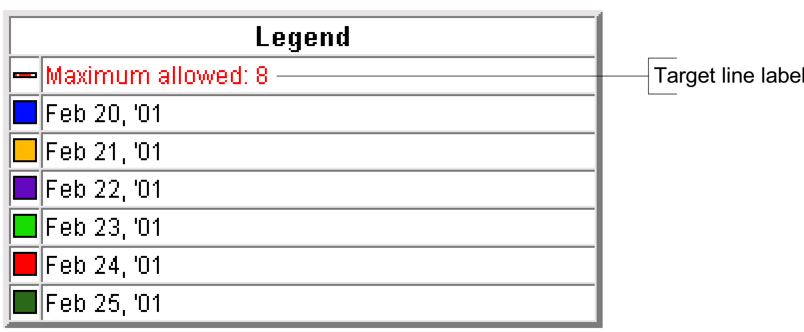
If you do not specify a target line, the highest detail value is used as the target and all other values are charted against that number.



Detail chart with no target line

6. If you entered a Target Line Value, enter a Target Line Label.

The target line label appears in the chart's legend. If you do not enter a label, the legend will not include any information about the target, even if you've entered a target value.



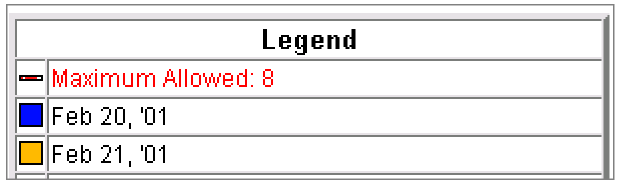
Target line label

7. Choose whether to display a legend for the chart.

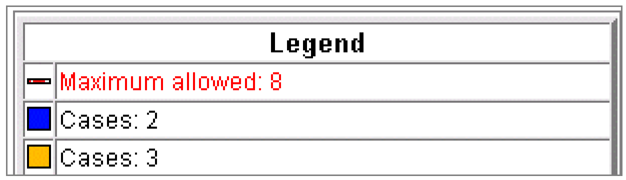
Select the **Display Legend** check box if you want the chart to include a legend; clear this check box to hide the legend.

8. Choose the Legend Settings.

Legend/Color Combination The legend identifies the dates or times for the detail time periods.



Legend/Value Combination The legend identifies the number or percentage of cases for the detail time periods.



Target Line Label and Values The legend shows only the target line label and value.

9. Click **Save.**

10. Click **OK.**

Your new settings are now in effect.

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