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# PeopleSoft CRM 9.2: Call Center Applications

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# Preface

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## Understanding the PeopleSoft Online Help and PeopleBooks

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

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

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

### Common Help Documentation

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

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product 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 the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

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

## Field and Control Definitions

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

## Typographical Conventions

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

<i><b>Typographical Convention</b></i>	<i><b>Description</b></i>
<b>Bold</b>	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Highlights 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.  Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> .
Key+Key	Indicates a key combination action. For example, a plus sign ( + ) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
Monospace font	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<b><i>Typographical Convention</i></b>	<b><i>Description</i></b>
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

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

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

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

## Region and Industry Identifiers

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

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

### Region Identifiers

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

- Asia Pacific
- Europe
- Latin America

- North America

## Industry Identifiers

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

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

## Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft CRM Related Links

[PeopleSoft Information Portal on Oracle.com](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)



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## Contact Us

Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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# Getting Started with PeopleSoft CRM Call Center Applications

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## PeopleSoft CRM Call Center Applications Overview

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

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

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

---

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

---

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

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

---

## PeopleSoft CRM Call Center Business Processes

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

### Business Processes for Call Center Applications

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

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

### PeopleSoft Support Business Processes

PeopleSoft Support enables you to:

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

### **PeopleSoft HelpDesk Business Processes**

PeopleSoft HelpDesk enables you to:

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

### **PeopleSoft HelpDesk for Human Resources Business Processes**

PeopleSoft HelpDesk for Human Resources enables you to:

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

### **Service Center for Higher Education**

PeopleSoft Service Center for Higher Education enables you to:

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

## PeopleSoft Quality Management

PeopleSoft Quality Management enables you to:

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

## PeopleSoft Change Management

PeopleSoft Change Management enables you to:

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

---

# PeopleSoft CRM Call Center Integrations

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

## Integration with Other PeopleSoft CRM Applications

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

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

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

Call center applications integrate with these PeopleSoft applications:

- Integrated FieldService.
- Sales.
- Order Capture.
- Contracts.

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

## Integration with External Systems

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

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

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

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

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

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

---

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

---

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

## Related Links

"Understanding Enterprise Integration Technology (*PeopleSoft CRM 9.2: Business Object Management*)"

"Business Object Relationship Modelling (*PeopleSoft CRM 9.2: Business Object Management*)"

## PeopleSoft Call Center Applications Implementation

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

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

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

<b>Component</b>	<b>Component Interface</b>	<b>References</b>
RC_CASE_TYPE	RC_CASE_TYPE_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RC_PRIORITY	RC_PRIORITY_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RC_PROBTYPE	RC_PROBTYPE_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RC_SEVERITY	RC_SEVERITY_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RC_STATUS	RC_STATUS_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RC_QUICK_CODE	RC_QUICK_CODE_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RBT_TGUIDE_SETUP	RBT_TGUIDE_SETUP_SCI	See <a href="#">Configuring Troubleshooting Guide</a> .
RC_SOLN_LIB_SETUP	RC_SOLN_LIB_SETUP_SCI	See <a href="#">Configuring Troubleshooting Guide</a> .
RC_CTD_DEFINE	RC_CTD_DEFINE_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .
RC_CTD_COMBINE	RC_CTD_COMBINE_CI	See <a href="#">Setting Up Basic Prompt Tables for Cases</a> .

### Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the Application Fundamentals (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*) documentation with information about where to find the most current version of each.



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



## Chapter 2

# Defining Call Center Business Units and Display Template Options

---

## Understanding Call Center Business Units

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

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

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

See "Understanding TableSet Controls in PeopleSoft CRM (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

---

## Understanding Display Templates

This section discusses:

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

## Appearance and Behavior Control

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

The PeopleSoft CRM Call Center application delivers the Case component with multiple templates. You can, however, create new display templates or modify existing ones. You can also automatically change

display templates on the pages within the Case component based on certain case criteria using AAF policies. Additionally, agents can manually change their views of cases using different display templates.

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

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

Use display templates to control:

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

---

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

---

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Display Template Families

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

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

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

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

## Related Links

"Understanding Display Templates (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## AAF Policies and Display Templates

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

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

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

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

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

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

### Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Defaulting Logic

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

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

### Display Template Family Defaulting Logic

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

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

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

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

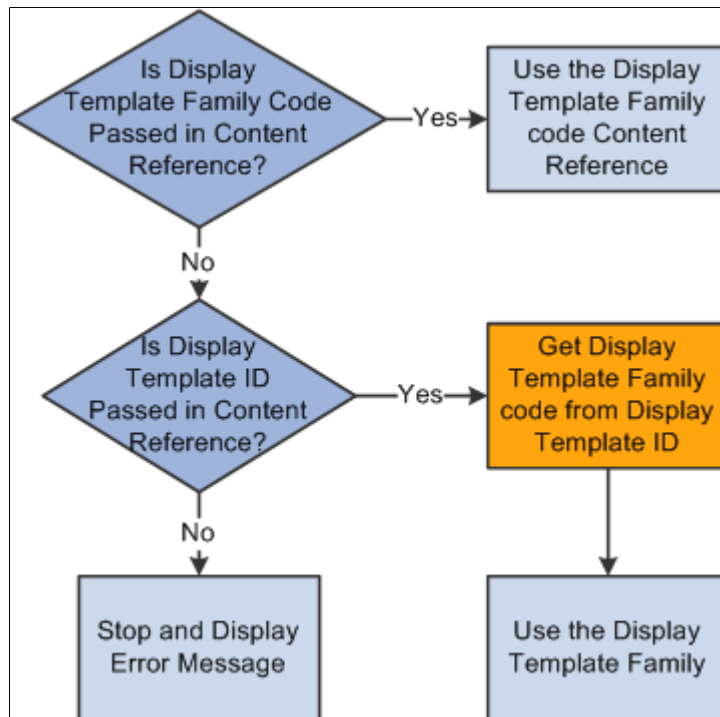
---

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

---

### Image: Display template family defaulting logic

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



### Business Unit Defaulting Logic

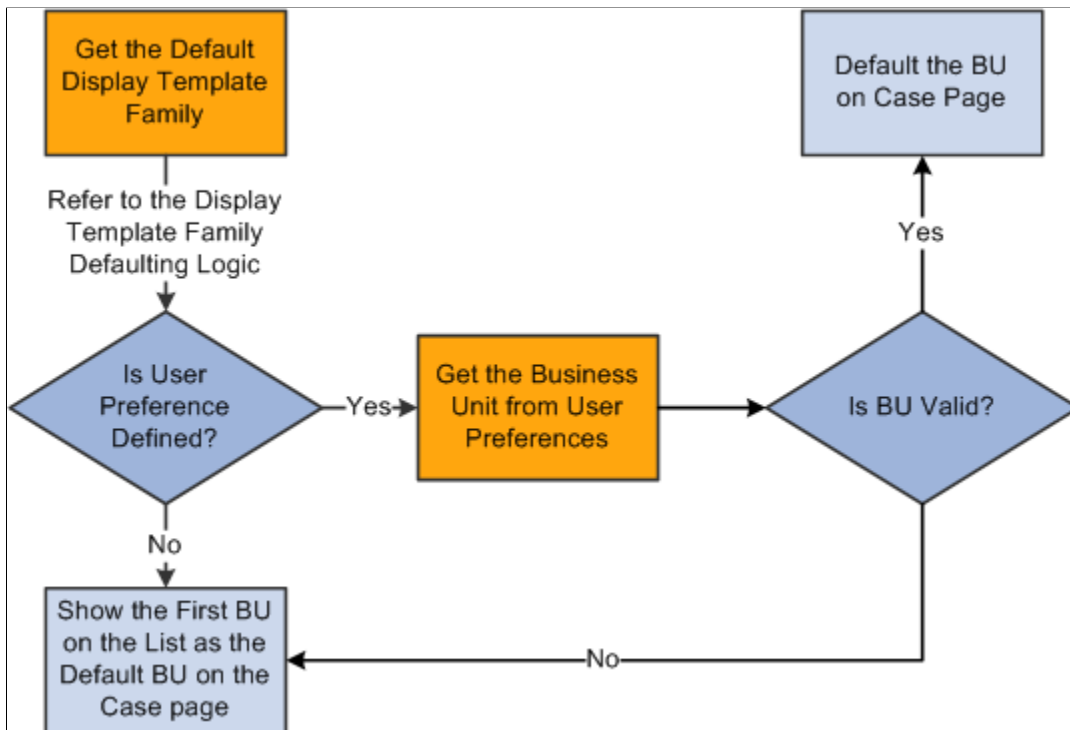
If you set up the User Preferences - Call Center page with display template, component, and business unit information, the system gets the business unit from the User Preferences page.

If the default business unit is not valid, the system uses the first business unit and display template ID in the list on the Case page for the Business Unit field. If an agent changes the business unit that the user has

access to while on the Case page, the system looks at the Display Template page within the Call Center Business Unit Definition component to display the correct display template family.

### Image: Business unit defaulting logic

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



### Display Template ID Defaulting Logic

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

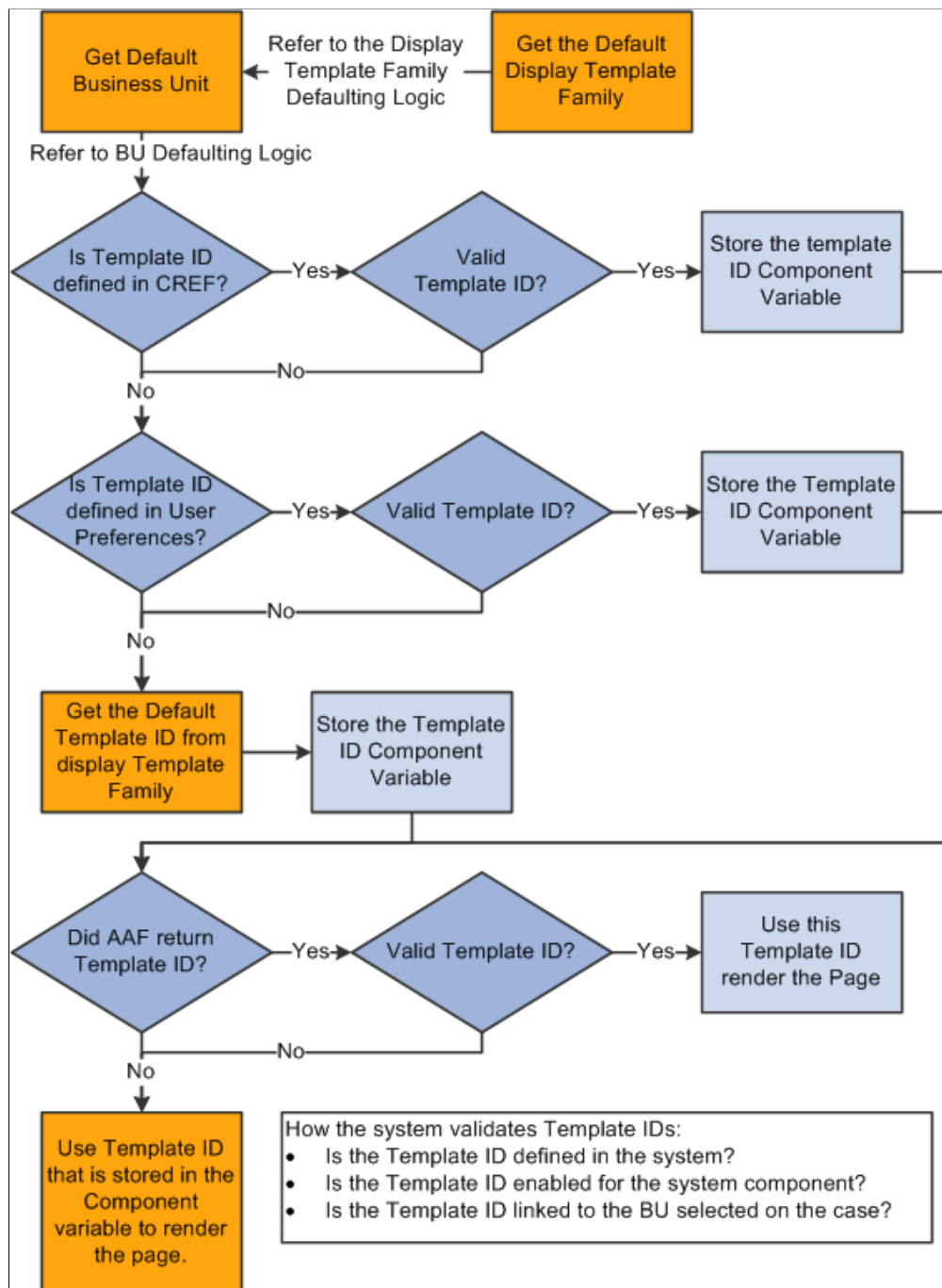
- From a CREF.
- From user preferences.
- From the display template family setup.
- Using AAF policies.



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

### Image: Display template ID defaulting logic

This flowchart shows the defaulting logic that the system uses.



---

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

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

---

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

---

## Understanding Assignment Options

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

---

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

---

This section discusses:

- Provider group assignment.
- Person assignment.

See "Understanding Provider Groups and Group Members (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Provider Group Assignment

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

<b>None</b>	Select <i>None</i> if you do not want any automatic assignment to occur; assignments must be made manually.
-------------	---

---

**Note:** Delivered AAF policies for cases send notifications to the agent or provider group that is assigned to a newly created case. If you allow unassigned cases to be saved, you should define a mechanism for routing and handling these cases.

---

### Any

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

If you select *Any*, the assignment engine finds the worker or provider group with the highest overall fit score.

---

**Note:** If a user manually assigns an agent to the case and the agent is in exactly one provider group, the system automatically assigns the agent's provider group to the case when it is saved. If the agent is in more than one provider group, the system leaves the Provider Group field blank on the Case page when the case is saved. You could, however, have a provider group that is available and none of the workers are available.

---

### Available

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

If you select *Available*, the assignment engine looks only at provider groups that are currently available according to the schedules you create.

### Default

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

If you select *Default*, the system will address whether an agent is on the case. If an agent is on the case and that agent is in only one provider group, the system assigns that provider group as the *Default* provider group. Otherwise, the system leaves the Provider Group field blank.

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 system leaves the Provider Group blank.

---

**Note:** This option is available only for cases created by agents, not for cases created by self-service application users. However, you can set up a self-service provider group on the Case Defaults page using the Assigned to Provider Group field for self-service call center components.

---

## Person Assignment

The following definitions describe options for automatically assigning new cases to individual agents. These settings apply only when the Assigned To field is blank in a newly submitted case; the system does

not override an existing value in the Assigned To field. For example, if you use a Quick Code to assign an agent, then the system does not attempt to assign a different agent when you save the case.

---

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

---

<b>None</b>	<p>Indicates that the system does not assign new cases to agents.</p> <hr/> <p><b>Note:</b> Be aware that delivered AAF policies for cases send notifications to the agent or provider group that is assigned to a newly created case. If you allow agents to save unassigned cases, you should define a mechanism for routing and handling those cases.</p> <hr/>
<b>Any</b>	<p>Select to have the assignment engine assign the case to the person with the highest fit score (if a provider group was previously entered, either manually or through auto-assignment). If the system did not assign a provider group, then it does not assign an agent either.</p>
<b>Available</b>	<p>Select to have the assignment engine check worker schedules and assign cases only to agents who are available at the time the case is assigned.</p> <hr/> <p><b>Note:</b> The <i>Any</i> and <i>Available</i> options use the assignment engine. For the assignment engine to assign an agent, a provider group must already be assigned.</p> <hr/>
<b>Default</b>	<p>Select to have the system assign the case to the agent who created the case.</p> <p>This setting only applies if the case is new. If you update an existing case and clear the Assigned To field, the system leaves it blank. This functionality is true for the other assignment options as well. If you want to run the assignment engine after the initial creation of the case, you need to use the Suggest a Provider Group and Suggest an Agent buttons next to the fields.</p> <p>The system handles case assignments according to these rules:</p> <ul style="list-style-type: none"> <li>• If a provider group is specified, either manually or through auto-assignment, the system does not assign the case to an agent.</li> <li>• If no provider group is specified, the system assigns the case to the agent who created the case.</li> <li>• If the provider group auto-assignment option is also Default, then the system assigns the case to the agent's provider group (assuming that one can be uniquely identified).</li> </ul>

---

**Note:** This option is for cases created by agents. For cases created through a self-service application, you can set up a default provider group on the Case Defaults page that you can use for self-service. The system will assign a provider group, but it will not assign an agent.

---

See "Understanding Assignment Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

---

## Defining Call Center Business Units

To define call center business units, use the Call Center Definition (RC\_BUS\_UNIT) component.

This section lists prerequisites and discusses how to:

- Create a call center business unit.
- Define business rules for a call center business unit.
- View case match rules.
- Set up display templates.
- Set up case defaults.

## Pages Used to Define Call Center Business Units

Page Name	Definition 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.
Match Usage	RC_MATCH_SUMMARY	Click the Match Usage link on the Business unit - Options page.	View the case matching criteria defined for this business unit and associated SetID.
Business Unit - Display Templates	BUS_UNIT_RC_RDT	Set Up CRM, Business Unit Related, Call Center Definition, Display Templates	Associate display template families and display templates with the 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.

## Related Links

"Understanding Business Units in PeopleSoft CRM (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding TableSet Controls in PeopleSoft CRM (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Prerequisites

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

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

## Call Center BU Page

Use the Call Center BU page (BUS\_UNIT\_RC1) to create call center business units and establish default business units to use when integrating with other PeopleSoft applications.

## Navigation

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

### Image: Call Center BU page

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

**Call Center BU**

**Business Unit** EUR01

**Business Unit Description**

\*Description European Operations

\*Short Description Euro Ops

\*Default SetID EUR01

\*Status Open

Create BU

Self-Service Description

Service Order Unit

RMA Unit

Sales Unit

Quality Unit

Order Capture Unit

Online Marketing Unit

Change Unit

Modified

\* Required Field

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

### Business Unit

Displays the business unit identifier you entered when you first accessed the page. To maximize system performance, always use exactly five characters.

## Business Unit Description

### Description

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

### Default SetID

The Default SetID field appears only when you open the Call Center BU page in Add mode. Once you create the business

unit, the system sets up default tableset control information, and you must use the TableSet Control page to change the default.

Enter or select the default setID for the business unit. When you create a business unit, the system copies the setID for each record group from the tableset control of the setID you have entered. In the tableset control record, each of the delivered record groups is associated with the setID that you enter here or a setID that is being shared (SHARE) with other setIDs.

---

**Note:** The system will always create a setID that is equal to the business unit that you create. Every business unit is also a setID.

---

### Status

Indicates the call center status. Values are: *Open* (active) or *Closed* (inactive). The system does not process transactions for closed business units.

---

**Note:** You cannot create a new case for a closed business unit, but you can continue working a case that has already been created with a business unit that was closed after the case was opened.

---

### Create BU (create business unit)

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

Click to establish the tableset controls for the call center business unit based on the default setID that you specify.

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

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

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

### Self-Service Description

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

### Service Order Unit

Enter the default FieldService business unit to use when creating service orders from call center cases. When you establish tableset sharing, ensure that the field service business unit and the call center business unit prompt against the same set of customers.

### RMA Unit (return material authorization unit)RMA Unit

Enter the default RMA business unit to use when creating a return material authorization from a case.



**Sales Unit Sales Unit field**

Enter the default Sales business unit to use when creating a sales lead from the Related Actions page in a call center case. When you establish tableset sharing, make sure that the sales business unit and the call center business unit prompt against the same set of customers.

**Quality Unit**

Enter the default Quality Management business unit to use when creating or relating a defect to a case. You can create a new defect or relate an existing defect. In either case, the system displays the business unit that you enter here on the page.

**Order Capture Unit**

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

---

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

---

**Online Marketing Unit**

Select the online marketing business unit that you want the system to use by default in the Dialog Business Unit field when a user selects the *Case Survey* related action to launch a customer survey from the Case page.

## Business Unit - Options Page

Use the Business Unit - Options page (BUS\_UNIT\_RC2) to define business rules for a call center business unit.

## Navigation

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

### Image: Business Unit - Options page (1 of 3)

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

Call Center BU			Options	Display Templates	Case Defaults
Business Unit		US200	CRMCO APPLIANCES		
<b>Agent</b>					
Enable Feature	Option	Notes			
<input checked="" type="checkbox"/> Assign Person	Currently available group only	Automatically assign the case when it is saved			
<input checked="" type="checkbox"/> Assign Provider Group	Currently available group only	Automatically assign the case when it is saved			
<input checked="" type="checkbox"/> Call Center Manager	Pierre DuBios	Call center manger for the selected business unit.			
<input checked="" type="checkbox"/> Max # of Notes in Web Service	5	Limit the number of notes in Web Service if you tend to have many notes in your cases			
<input checked="" type="checkbox"/> Product Prompt	All	Choose how you would like the product prompt to work			
<input type="checkbox"/> Allow Multiple Resolutions		Allow an agent to select more than one solution to be marked as successful.			
<input type="checkbox"/> Autoexecute Solution Search		Executes the Solution Search automatically when the 'Search' tab is clicked.			
<input checked="" type="checkbox"/> Canceled to Open Case Status		Allow Agents to Reopen Cases that are Canceled.			
<input checked="" type="checkbox"/> Closed to Open Case Status		Allow Agents to Reopen Cases that are Closed.			
<input type="checkbox"/> Security Matrix		Generally used for Financial Services			

### Image: Business Unit - Options page (2 of 3)

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

<input checked="" type="checkbox"/> Percent of SLA for Red	95	Define the percentage of SLA Restore time when a Case will turn Red
<input checked="" type="checkbox"/> Percent of SLA for Yellow	50	Define the percentage of SLA Restore time when a Case will turn Yellow
<input checked="" type="checkbox"/> Close with Business Project		Allow Agent to Close Case with In Process Business Project
<input checked="" type="checkbox"/> Close with Service Order		Allow Agent to Close Case with Open Service Order
<input type="checkbox"/> Case ID Before Save		Used to Display the Case ID Before Save.
<input type="checkbox"/> Change Adhoc Solution Status to "Submitted for Review"		Automatic update the Status of an Adhoc Solution when that Solution resolves the Case.
<input checked="" type="checkbox"/> Solve Case from Outbound Notification		Allow Case to be solved from an Outbound Notification
<input checked="" type="checkbox"/> Email Resolution Solution ID	301376	Canned solution for resolving a case from an outbound email
<input checked="" type="checkbox"/> Enable Case Match	Match Usage	Allow agents to find and relate similar cases using the predefined match criteria for the Business Unit or Provider Group on the case.
<input checked="" type="checkbox"/> Reason Interested	Account Representative	Choose the reason to use when the Add Interested Party action is taken from the 360 degree view global cases node.

## Image: Business Unit - Options page (3 of 3)

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

Self-service		
Enable Feature	Option	Notes
<input checked="" type="checkbox"/> Assign Person	Assign any qualified Person	Automatically assign the case when it is saved
<input checked="" type="checkbox"/> Assign Provider Group	Assign any Provider Group	Automatically assign the case when it is saved
<input checked="" type="checkbox"/> Solution newly created period	<input type="text" value="30"/>	How long the 'new' icon shows for solutions
<input checked="" type="checkbox"/> Allow Case to be Closed		Allow Self-service Users to Close Cases
<input checked="" type="checkbox"/> Allow Case to be Reopened		Allow Self-service Users to Reopen Cases that are Closed
<input checked="" type="checkbox"/> Grace Period (Days)	<input type="text" value="7"/>	How long a self-service user can reopen the case. After that, a new case need to be created.
<input checked="" type="checkbox"/> Reason Interested	Customer	Choose the reason to use when the Notify Me action is taken from a Self Service Case or Known Issues.

Modified 03/04/2013 3:16PM PST SAMPLE

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

### Assign Person

Select the option that you want the system to use to automatically assign new cases to individual agents.

See [Person Assignment](#).

### Assign Provider Group

Select the option that you want the system to use to automatically assign provider groups to new cases.

See [Person Assignment](#).

### Call Center Manager

Select your default call center manager. You can use the selection here to route workflow using AAF notifications.

See "Understanding PeopleSoft CRM Workflow (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

### Max # of Notes in Web Service

If you tend to have many notes in your cases, enter a number that limits the volume of notes that you want included in a web service. If you leave this field blank, the system includes all notes.

### Product Prompt

Select how you want the product prompt to work. The options are:

- *All*

You can select a product from the master products table.

- *Installed*

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

	See "Defining Products ( <i>PeopleSoft CRM 9.2: Product and Item Management</i> )".
<b>Allow Multiple Resolutions</b>	Select if you want to allow an agent to select more than one solution to be marked as <i>Successful</i> .
<b>Autoexecute Solution Search</b>	Select if you want the PeopleSoft search to automatically execute when the Search page is accessed.
<b>Canceled to Open Case Status</b>	Select to allow agents to reopen cases that are in a canceled status.
<b>Closed to Open Case Status</b>	Select to allow agents to reopen cases that are closed.
<b>Bill for Cases</b>	Select if you are using the billing functionality for support cases. Select the Details link to enter price by currency and rate type information.
	<hr/> <b>Note:</b> This field appears only if you selected the Send Billing Transactions to Contracts and Calculate Price on Case check boxes on the Installation Options - Billing and Pricing Options page. <hr/>
<b>Percent of SLA for Red (percent of service level agreement for red)</b>	Enter a number to indicate the percentage of SLA (Service Level Agreement) restore time that needs to pass before the system turns the case to red. For example, enter 90 (enter a whole number, not a decimal amount) if you want a case to turn red when it has reached 90 percent of the SLA restore time. In addition, this calculation takes into account the time the case is on hold.
<b>Percent of SLA for Yellow percent of Service Level Agreement for yellow)</b>	Enter a number to indicate the percentage of SLA restore time that needs to pass before the system turns the case to yellow. The number you enter in this field must be lower than the red number or you will receive an error message. As such, a case should turn yellow before it turns red. These fields will accept numbers between 1 and 999. Do not enter decimal amounts.
<b>Close with Business Project</b>	Select to allow agents to close cases with business projects that are at the <i>In Process</i> status.
<b>Close with Service Order</b>	Select to allow agents to close cases that have an open service order.
<b>Case ID Before Save</b>	Select to generate a case ID when the agent first opens the case.
<b>Change Adhoc Solution Status to "Submitted for Review"</b>	Select to automatically update the status of an ad hoc solution to <i>Submitted for Review</i> when a solution resolves a case.
<b>Solve Case from Outbound Notification</b>	Select to allow cases of this business unit to be resolvable when outbound notifications are sent.  This option is selected by default. When selected, the Send and Solve toolbar button appears on the Outbound Notification page

if the initiating transaction is case. You can click this button for the system to perform these tasks:

- Deliver the drafted notification to recipients.
- Solve the associated case by attaching a predefined canned solution (the specified email resolution solution ID) to the case and setting the case status to the resolved case status as specified on the Case Defaults page.

See "Sending Manual Notifications From CRM Transactions (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

### Email Resolution Solution ID

Select to specify a solution that attaches to cases when users click the Send and Solve button on the Outbound Notification page. Solutions meeting these criteria are available for selection:

- Solutions are of type *Canned Solution*.
- Solutions are active.
- Solutions belong to the setID that is associated with the call center business unit.

When the system resolves a case from an outbound notification, it attaches a solution to the case with a solution status of *Successful Resolution* and then sets the status of the case to the predefined resolved case status. As a result, the system also increases the usage count of the canned solution by one as well.

---

**Note:** If you access the Outbound Notification page by clicking the Email button to email a solution and click the Send and Solve button, the selected solution is then used to attach to the related case as the successful resolution. The canned solution does not apply when a solution is already selected.

---

This option is selected automatically if the Solve Case from Outbound Notification option is selected. Make sure to specify an email resolution solution; otherwise, an error message appears if you click the Send and Solve button but no canned solution is available to attach and resolve the case. In this case, the system sends the notification but it does not resolve the case.

### Enable Case Match

Select this to enable case matching for this Business Unit. Case matching enables you to instruct the system to find cases that are similar to the case you are presently viewing. This provides a quick way to check if the issue from the current case you are viewing has already been reported in or is related to another case.

---

**Note:** The rules for defining case matches are defined on the Match Detail page, and can be viewed using the Match Usage link on the Options page for Call Center Business Unit defaults.

---

**Match Usage**

Click this link to view the match usage criteria that have been defined for this business unit and associated SetID on the Match Detail page.

**Reason Interested**

Specify the reason to be associated with the entry for interested party on a case when the Add Interested Party action is taken from the 360-Degree View global cases node.

**Self-Service Options****Assign Person**

Select the option that you want the system to use to automatically assign self-service cases to individual agents.

See [Person Assignment](#).

**Assign Provider Group**

Select the option that you want the system to use to automatically assign provider groups to new cases.

See "Understanding Provider Groups and Group Members (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

**Solution Newly Created Period**

Specify how long (in days) the *new* icon should appear for solutions.

**Allow Case to be Closed**

Select to allow self-service application users to close cases.

**Allow Case to be Reopened**

Select to allow self-service application users to reopen cases that are closed.

**Grace Period (Days)**

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

**Related Links**

"Understanding TableSet Controls in PeopleSoft CRM (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

**Match Usage Page**

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

## Navigation

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

### Image: Match Usage page

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

**Call Center Business Unit Options**

**Match Usage**

**Business Unit** HRH DU **Description** HR HelpDesk

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

**Provider Group**

No match definition is found for Provider Group

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

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

---

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

---

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

## Business Unit - Display Templates Page

Use the Business Unit - Display Templates page (BUS\_UNIT\_RC\_RDT) to associate display template families and display templates with the business unit.

## Navigation

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

### Image: Display Templates page

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

Business Unit PSUNV PeopleSoft University	
Enabled Templates	
*Template Family	*Display Template ID
CRM_HE	CRM_HE
CRM_HE	CRM_HE_SUPPORT

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

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

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

## Case Defaults Page

Use the Case Defaults page (BUS\_UNIT\_RC\_DEF) to set up defaults for all call center applications.



## Navigation

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

### Image: Case Defaults page (1 of 2)

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

### Image: Case Defaults page (2 of 2)

This example illustrates the fields and controls on the 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

### Template Family

Select the display template family that you want to use for this business unit. The system shows all the existing display template families that are defined in the system.

### Call Center Component

Select the component that you want to associate with the display template family that is displayed in the previous field. The system displays the components that are defined for the selected display template family.

You can set up different defaults for different components on the same template, and you can set up different default values for different templates that use the same business unit. When you select a component, the system may display a different set of fields, as not all default fields apply to each call center component.

## All Call Centers

### New Case Status

Select the status that you want the system to use when an agent opens a new case.

---

**Note:** Although most defaults are optional, the New Case Status default is required for the component that is used to report new self-service cases. Without a default value, the system cannot save the case. Also, because Case Status is a required field for a case, an agent reporting a case through a self-service application cannot set the case status.

---

### Resolved Case Status

Select the value that you want the system to use when an agent identifies a successful solution and resolves the case.

Both agents and self-service application users can resolve cases. Agents resolve cases by setting a solution status to *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, select the status that you want the system to use when the self-service application user reopens a case. If you do not enter a status here, then, when an agent or self-service user reopens a case, the status will not change. The result could be cases closing without a successful resolution—a condition that the system does not normally allow.

### Duplicate Case Status

If you relate one case to another, and the associated relationship type definition has the Set status of child case using duplicate case status from the Business Unit Defaults check box selected, then the child case status will be automatically set to the value specified in this field.

---

**Note:** If this field has no value, then the child case status will not be updated when it is related to another case, even if the associated relationship type definition has the Set status of child case using duplicate case status from the Business Unit Defaults option checked.

---

<b>Case Type</b>	Select the default case type for a new case.
<b>Case Subtype</b>	Select the default case subtype for a new case.
<b>Case Priority</b>	Select the default case priority for a new case.
<b>Case Impact</b>	Select the default case impact for a new case.
<b>Urgency</b>	Select the default case urgency for a new case.
<b>Case Severity</b>	Select the default case severity for a new case.
<b>Source</b>	Select the default source for the case. This field enables you to tell which cases were entered by way of self-service applications or by agents.
<b>Source Web Service</b>	Select the default source for a case that is created through a web service.
<b>Source ERMS</b>	Select the default source for a case that is created through the PeopleSoft CRM ERMS system.  See "Understanding ERMS Setup ( <i>PeopleSoft CRM 9.2: Multichannel Applications</i> )".
<b>Source HCM</b>	Select the default source value to populate for cases that are automatically created when personal or job data updates have occurred in the integrated HCM system. Use this field when the automatic case creation feature is enabled.
<b>Product Group</b>	Select the default product group for a new case. When an agent or user selects a Product Group on a case, the system filters the values for the product and installed product to only display the products and installed products contained within the specified product group.

## Category/Type/Details (CTD) Defaults

<b>Category</b>	Select the default case category for a new case.
<b>Specialty Type</b>	Select the default case specialty type for a new case.
<b>Detail</b>	Select the default case detail for a new case.

## Defaults for Self-Service

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

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

### Related Links

[Understanding Call Center Prompt Tables](#)

---

## Defining Display Template General Options for PeopleSoft Call Center

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

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

---

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

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Display Template	RDT_TMPL_PAGE	Set Up CRM, Common Definitions, Component Configuration, Display Templates, Display Template Details	Use this page as an entry point to control the appearance and behavior of the specified component.

**Related Links**

"Understanding Display Templates (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

**Display Template Page**

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

## Navigation

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

### Image: Display Template page (1 of 2)

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

**Display Template**

**Template ID** RC\_SUPPORT **Family** Support Case Family  
**Description** Support **Component** RC\_CASE

Pages				
Enable	Page	Add Mode Default	Update Mode Default	Comments
<input checked="" type="checkbox"/>	<a href="#">Case</a>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Case Main page
<input checked="" type="checkbox"/>	<a href="#">Solution</a>	<input type="checkbox"/>	<input type="checkbox"/>	Solution
<input checked="" type="checkbox"/>	<a href="#">Summary</a>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Summary
<input checked="" type="checkbox"/>	<a href="#">Notes</a>	<input type="checkbox"/>	<input type="checkbox"/>	Case Note
<input checked="" type="checkbox"/>	<a href="#">Tasks</a>	<input type="checkbox"/>	<input type="checkbox"/>	Case Tasks
<input checked="" type="checkbox"/>	<a href="#">Case History</a>	<input type="checkbox"/>	<input type="checkbox"/>	History
<input checked="" type="checkbox"/>	<a href="#">Related Cases</a>	<input type="checkbox"/>	<input type="checkbox"/>	Related Cases
<input checked="" type="checkbox"/>	<a href="#">Related Actions</a>	<input type="checkbox"/>	<input type="checkbox"/>	Related Objects
<input checked="" type="checkbox"/>	<a href="#">Interested Parties</a>	<input type="checkbox"/>	<input type="checkbox"/>	Interested Parties
<input type="checkbox"/>	Billing	<input type="checkbox"/>	<input type="checkbox"/>	Billing
<input type="checkbox"/>	Attributes	<input type="checkbox"/>	<input type="checkbox"/>	Attributes
<input checked="" type="checkbox"/>	<a href="#">Case Print View</a>	<input type="checkbox"/>	<input type="checkbox"/>	Enabling this page to open the Printable Case page in a new window when the Print button is pressed

## Image: Display Template page (2 of 2)

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

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

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

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

## Pages

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

### Page

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

### Add Mode Default

Select to show the corresponding page by default when you create a transaction for the component. Selecting this check box is optional and you can select only one page as the default. If you don't identify a default page, the system displays the page that is specified for the component in Application Designer.

If users access the component and they don't have permission to access the default page, the system displays the first page in the component that the user has permission to access.

**Update Mode Default**

Select to show the corresponding page by default when you open an existing transaction for the component. Selecting this check box is optional. You can select only one page as the default. The display logic that is used for the add mode applies to the update mode as well.

**General Options**

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

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

---

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

---

<b>Licensed Product Code</b>	Select the licensed product that this display template applies to.
<b>Licensed Product Definition</b>	Enter a description of the licensed product identified in the previous field.
<b>360 Degree Version</b>	<p>Select the type of <i>360-Degree View</i> that you want to use for this template. Options are <i>Customer</i>, <i>Constituent</i>, <i>HRHD Worker</i>, and <i>Worker</i>.</p> <p>See "Understanding 360-Degree View Setup (<i>PeopleSoft CRM 9.1 Application Fundamentals PeopleBook</i>)".</p>
<b>Application Set Extension</b>	This option contains functions to handle additional business logic to be performed when the user clicks selected tabs, links, and other items on the page. Do not change this value unless you are familiar with this application class extension.
<b>Search Definition Name</b>	Select the Solution Advisor Search Definition Name that you want to use for this template.
<b>BO Search Adapter Name (business object search adapter name)</b>	<p>Select the adapter to use for this template on this component. The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the sub-pages of the component upon which these fields appear.</p> <p>See "Understanding BO Search and Quick Create Setup (<i>PeopleSoft CRM 9.2: Business Object Management</i>)".</p>
<b>Email Template for Case Notes</b>	Select the default correspondence template that you want to use to email case notes to customers or employees.



	See "Understanding Correspondence Generation ( <i>PeopleSoft CRM 9.2: Automation and Configuration Tools</i> )".
<b>Email Template for Solutions</b>	Select the default correspondence template that you want to use to email solutions to customers or employees.  See "Understanding Correspondence Generation ( <i>PeopleSoft CRM 9.2: Automation and Configuration Tools</i> )".
<b>Portal Name</b>	Select the portal that you want the system to use for transferring information when you are using a content reference.  See <a href="#">Understanding Link Setup</a> .
<b>Portal Object Name</b>	Select the content reference that you want the system to use for transfers.  See <a href="#">Understanding Link Setup</a> .
<b>Action Group ID</b>	Select the action link group that you want the system to use for this template. This group is the superset of all action links that a user will be able to use for this template.  See <a href="#">Understanding Link Setup</a> .
<b>Task Template</b>	Select the application usage to filter which task templates are available on the case for that display template.
<b>Toolbar</b>	Select which toolbar should appear on the case for that display template.

---

## Managing Policies Using Case Display Template Actions

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

### Page Used to Manage Policies Using Case Display Template Actions

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Manage Policies by Case Display Template Action	RC_RDT_PLCY_SRCH	Set Up CRM, Common Definitions, Component Configuration, Display Templates, Case Display Template Policies	View AAF policies that are using the Case Display Template action.

### Manage Policies by Case Display Template Action Page

Use the Manage Policies by Case Display Template Action page (RC\_RDT\_PLCY\_SRCH) to view AAF policies that are using the Case Display Template action.

## Navigation

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




### Image: Manage Policies by Case Display Template Action page

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


**Manage Policies by Case Display Template Action**

▼ Search

Use Saved Search


Search Clear [Advanced Search](#)  [Save Search Criteria](#)  Delete Saved Search  [Personalize Search](#)


---


\*SetID =  SHARE  SHARE


Policy Name begins with




Status =

Trigger Point =  

Context =  

Template Family =  CRM\_HE  Higher Education Family

Display Template ID =  

Search Clear [Advanced Search](#)  [Save Search Criteria](#)  Delete Saved Search  [Personalize Search](#)

[Build Policy](#)

SetID = SHARE AND Template Family = Higher Education Family

Policy Name	SetID	Trigger Point Name	Display Template Family	Display Template
<a href="#">Higher Education Support Case</a>	SHARE	When a Support Case is Presented	Higher Education Family	Higher Education - Support
<a href="#">Higher Education IT Case</a>	SHARE	When a Support Case is Presented	Higher Education Family	Higher Education - IT
<a href="#">Higher Education Case</a>	SHARE	When a Support Case is Presented	Higher Education Family	Higher Education

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

# Setting Up Call Center Prompt Tables

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## Understanding Call Center Prompt Tables

This section discusses:

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

## Call Center Prompt Tables

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

### Prompt Tables for All Cases

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

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

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

Problem types are defined by the product for which a case is being created. Use problem types to associate products with the competencies that one needs to resolve a problem. Because Problem Type is a child of Product, the Problem Type field on the Case page derives its values from Product. The Product must be set up before Problem Type. Competencies for Problem Type are not restricted, however.

See "Understanding Products in PeopleSoft CRM (*PeopleSoft CRM 9.2: Product and Item Management*)".

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

## Reason Codes

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

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

See [Setting Up Reason Codes](#).

## Case Relationship Types

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

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

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

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

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

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

from the web server global case because you do not want to close the child cases when the common case is closed.

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

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

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

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

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

## Related Links

[Understanding Case Management](#)

[Understanding Processing a Case](#)

[Understanding Material Return Processing](#)

[Understanding Change Request Management](#)

[Understanding Self-Service Transactions](#)

"Integrating with PeopleSoft Financial Management Services (*PeopleSoft CRM 9.2: Integrated FieldService*)"

"Integrating with PeopleSoft Human Capital Management (*PeopleSoft CRM 9.2: Integrated FieldService*)"

"Integrating with PeopleSoft SCM (*PeopleSoft CRM 9.2: Integrated FieldService*)"

## Delivered Values in Call Center Prompt Tables

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

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

## Relationship Types

This table lists the delivered relationship types:

Type	Hierarchical	Short Name	Labels
COMMO	Yes	Common	Parent, Child

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

## Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

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# Common Elements Used to Set Up Call Center Prompt Tables

## SetID

Except for quick codes, which are associated with business units, all of the prompt tables described in this documentation are associated with setIDs. This association enables you to set up different sets of values for different call center business units.

If you're setting up one set of values for all of your call centers, use the same setID for all of the values.

If you're setting up different sets of values for different call centers, enter the appropriate setID for each value.

## Self-Service

Select this check box to inform the system as to which values or fields self-service application users can select when creating new cases.

Select this check box to allow self-service application users to select priorities of *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 20 characters, names longer than 15 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 cannot select a value (the

behavior controlled by the check box), they still may be able to view it.

If you don't enter a description, the system copies the short description to this field when you save the page.

If the value appears on any of the self-service pages, the self-service description appears instead of the regular short description.

**Long Description**

Enter a long name, up to 50 characters, that describes the value.

**Effective Date**

Enter the effective date of the value.

Most prompt table values are not effective-dated; only quick codes and reason codes have effective dates.

**Status**

Select a status to determine whether an effective-dated item (a quick code or a reason code) is active or inactive as of the associated effective date.

---

## Setting Up Basic Prompt Tables for Cases

To set up basic prompt tables for cases, use the Quick Code (RC\_QUICK\_CODE), Source (RC\_SOURCE), Severity (RC\_SEVERITY), Priority (RC\_PRIORITY), Case Type (RC\_CASE\_TYPE), Case Status (RC\_STATUS), Category/Type/Detail (RC\_CTD\_DEFINE), Combine Category/Type/Detail (RC\_CTD\_COMBINE) and Impact (RC\_IMPACT) components.

This section lists prerequisites and discusses how to:

- Set up case statuses.
- Set up case types.
- Set up case priorities.
- Set up case urgency values.
- Set up case severity values.
- Set up impact values.
- Set up case sources.
- Set up problem types.
- Set up individual case categories, speciality types and details.
- Set up combinations of case categories, speciality types and details.
- Set up quick codes.

## Pages Used to Set Up Prompt Tables for All Cases

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Case Status	RC_STATUS	Set Up CRM, Product Related, Call Center, Case Status, Case Status	Set up case status values.
Case Type	RC_CASETYPE	Set Up CRM, Product Related, Call Center, Case Type, Case Type	Set up case type values.
Priority	RC_PRIORITY	Set Up CRM, Product Related, Call Center, Priority, Priority	Set up case priority values.
Urgency	RC_URGENCY	Set Up CRM, Product Related, Call Center, Urgency, Urgency	Set up case urgency values.
Severity	RC_SEVERITY	Set Up CRM, Product Related, Call Center, Severity, Severity	Set up case severity values.
Impact	RC_IMPACT	Set Up CRM, Product Related, Call Center, Impact, Impact	Set up impact 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_CTD_CATEGORY	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category	Set up case category values.
Category Competencies	RC_CTD_CAT_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category Competencies	Set up case category competency values.
Specialty Type	RC_CTD_TYPE	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type.	Set up case specialty types.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Specialty Type Competencies	RC_CTD_TYPE_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type Competencies.	Set up case specialty type competencies.
Detail	RC_CTD_DETAIL	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail.	Set up case details.
Detail Competencies	RC_CTD_DETAIL_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Detail Competencies.	Set up case detail competencies.
Combine Category/Type/Detail	RC_CTD_COMBINE	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Combine Category/Type/Detail.	Set up valid combinations of category, specialty type, and detail.
Combine Category/Type/Detail: Competencies	RC_CTD_COMP	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Combine Category/Type/Detail. Click the Competencies button for the desired Category/Type/Detail Result grid row.	View and edit competencies linked to the category, specialty type and detail associated with row of the grid from which the user clicked the Competencies button.
Quick Code	RC_QUICK_CODE	Set Up CRM, Product Related, Call Center, Quick Code, Quick Code	Set up quick code shortcuts that an agent can use to enter data automatically into various fields on the Case page.

## Prerequisites

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

- Before you set up quick codes, set up all of the values to be referenced by the quick code.  
Quick codes may reference most of the other setup values discussed in this section.
- You must set up your products before you can set up problem types.
- If you want to use competencies in case assignment, establish competencies before you set up the Category, Specialty Type, Detail, and Problem Types pages.

## Related Links

"Understanding Solutions (*PeopleSoft CRM 9.2: Services Foundation*)"

"Understanding Workers in CRM (*PeopleSoft CRM 9.2: Business Object Management*)"

"Understanding Provider Groups and Group Members (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Setting Up Competency Information in PeopleSoft CRM (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Case Status Page

Use the Case Status page (RC\_STATUS) to set up case status values.

### Navigation

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

### Image: Case Status page

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

**Case Status**

SetID CRM01      Description Appliance

Case Status						Customize	Find	First	1-13 of 13	Last
*Case Status	*Category	*Short Name	Self-Service Description	Long Description						
CANC	Canceled	Case Canceled	Case is Canceled	Case Canceled						
CANDU	Canceled	Canceled - Duplicate	Case Canceled - Duplicate	Case Canceled - Duplicate						
CUST	Open	Open - Awaiting User	Awaiting User Input	Open - Awaiting User						
DUP	Closed	Closed - Duplicate	Case Closed - Duplicate	Case Closed - Duplicate						
ENG	Open	Open - Awaiting Eng	Open - Awaiting Engineering	Open - Awaiting Engineering						
FAIL	Closed	Closed - Failure	Case Closed - Failure	Case Closed - Failure						
HOLD	On-Hold	On Hold	On Hold	On Hold						
OPEN	Open	Open - New Case	New Case	Open - New Case						
RESOL	Closed	Closed - Resolved	Case is Resolved	Case Closed - Resolved						
RMA	Open	Open - RMA	Open - RMA	Open - RMA						
ROPEN	Open	Case Reopened	Reopened Case	Case Reopened						
RSRCH	Open	Open - Research	Agent Researching Case	Open - Research						
SRVOD	Open	Open - Service Order	Open - Service Order	Open - Service Order						

\* Required Field

### Category

Select a case category value for each case status. This value drives many of your call center metrics. Because the actual status values vary by implementation, certain system processing is based on the category field rather than the actual case status. All statuses fall into one of these categories:

*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 your CRM data with a PeopleSoft or third-party billing system.

**Related Links**

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

[Case Closure](#)

**Case Type Page**

Use the Case Type page (RC\_CASETYPE) to set up case type values.

**Navigation**

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

**Image: Case Type page**

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

Case Type   ESI Options

SetID CRM02   Description Hardware Software

Case Type   Find | View All   First 1 of 13 Last

\*Case Type ADMIN   + -

☒ Self-Service

Self-Service Description Administrative Question

Long Description Administrative Question

\*Short Name Administrative Quest

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

Case Subtype	Self-Service	*Short Name	Self-Service Description	Long Description		
ADDRE	<input checked="" type="checkbox"/>	Billing Address	GBI Billing Address	Billing Address	+	-
PERSO	<input checked="" type="checkbox"/>	Update Pers Profile	Update My Profile	Update Customer Profile	+	-
POLIC	<input checked="" type="checkbox"/>	Policies	Policies	Policies	+	-

\* Required Field

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

**VAT Defaults**

Click this link to access the VAT Defaults Setup page. This is a common page that is used to set up value-added tax (VAT) defaults for all PeopleSoft applications that process VAT transactions. Use this page to define VAT defaults for service groups according to VAT registration country and state. The system displays VAT defaults and Service VAT Treatment defaults only when the integration to PeopleSoft Transaction Billing Processor is installed.

**Service VAT Treatment Defaults**

Click this link to access the Service VAT Treatment Drivers Setup page. This common page is used to set up VAT services treatment for all PeopleSoft applications that process VAT

transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for service groups on this page for a supplier's (seller's) location country and state.

### Case Subtypes

Use the fields in this section to enter descriptions of the case subtype that you want to associate with the case type that is described in the Case Type field.

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

## Priority Page

Use the Priority page (RC\_PRIORITY) to set up case priority values.

### Navigation

Set Up CRM, Product Related, Call Center, Priority, Priority

### Image: Priority page

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

*Priority	*Category	Self-Service	*Short Name	Self-Service Description	Long Description		
HIGH	High	<input checked="" type="checkbox"/>	High	Critical	High	+	-
LOW	Low	<input checked="" type="checkbox"/>	Low	Standard	Low	+	-
MED	Medium	<input checked="" type="checkbox"/>	Medium	Urgent	Medium	+	-
WHITE	High	<input checked="" type="checkbox"/>	White Board Case	White Board Case	White Board Case	+	-

\* Required Field

### Category

Select the category that you want the system to associate with the entry in the Priority field. All priority values are associated with a priority category. Values include *High*, *Medium*, and *Low*. The association between a priority and a priority category enables the display of the High Priority Problem Reports chart to help identify high-priority cases.

### Self-Service Description

Enter the descriptions of the priorities as you want them to appear on the self-service page of your call center application.

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

## Urgency Page

Use the Urgency page (RC\_URGENCY) to set up case urgency values.

## Navigation

Set Up CRM, Product Related, Call Center, Urgency, Urgency

### Image: Urgency page

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

**Urgency**

SetID PSUNV Description PeopleSoft University

*Urgency	Self-Service	*Short Name	Self-Service Description	Long Description		
HIGH	<input checked="" type="checkbox"/>	High	High	High	+	-
LOW	<input checked="" type="checkbox"/>	Low	Low	Low	+	-
MED	<input checked="" type="checkbox"/>	Medium	Medium	Medium	+	-

\* Required Field

### Self-Service Description

Enter the descriptions of the urgency values as you want them to appear on the self-service page of your call center application.

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

## Severity Page

Use the Severity page (RC\_SEVERITY) to set up case severity values.

## Navigation

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

### Image: Severity page

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

**Severity**

SetID PSUNV Description PeopleSoft University

*Severity	Self-Service	*Short Name	Self-Service Description	Long Description		
INTER	<input checked="" type="checkbox"/>	Intermittent	Intermittent	Intermittent	+	-
ONETI	<input checked="" type="checkbox"/>	Onetime Occurrence	Onetime Occurrence	Onetime Occurrence	+	-
RECUR	<input checked="" type="checkbox"/>	Recurring	Recurring	Recurring	+	-
REPRO	<input checked="" type="checkbox"/>	Reproducible	Reproducible	Reproducible	+	-

\* Required Field

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

## Impact Page

Use the Impact page (RC\_IMPACT) to set up impact values.

### Navigation

Set Up CRM, Product Related, Call Center, Impact, Impact

### Image: Impact page

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

Impact					
SetID PSUNV		Description PeopleSoft University			
Impact				Customize	Find
*Impact	*Short Name	Self-Service Description	Long Description		
MAJOR	Major	Major	Major	+	-
MINOR	Minor	Minor	Minor	+	-
SIGNI	Significant	Significant	Significant	+	-
TRIVI	Trivial	Trivial	Trivial	+	-

\* Required Field

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

## Source Page

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

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

## Navigation

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

### Image: Source page

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

**Source**

**SetID** PSUNV      **Description** PeopleSoft University

**Sources**      Customize | Find |      First 1-8 of 8 Last

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

\* Required Field

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

## Problem Type Page

Use the Problem Type page (RC\_PROBTYPE) to set up problem types.

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

## Navigation

Set Up CRM, Product Related, Call Center, Problem Type, Problem Type

### Image: Problem Type page

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

**Problem Type**

SetID PSUNV    Product BUS02    E-Business Fundamentals

**Problem Types** 1-5 of 5

- Bookmark issue
- Missing Chapter
- Error on page
- Cannot install
- Cannot save test

Create a New Type

**Problem Type** Find | View All First 1 of 5 Last

\*Problem Type BOOK    \*Short Name Bookmark issue    Delete

Self-Service Description Cannot create bookmark    ☒ Self-Service

Long Description Cannot create bookmark

**Problem Type Competency Information**

*Description	*Minimum Level	Weight
<input type="text" value=""/>	<input type="text" value=""/>	N / A

## Problem Type

### Problem Type

Enter an abbreviation to represent the problem type.  
Abbreviations can be no longer than five characters.

## Problem Type Competency Information

### Description

Select the competency needed to resolve the problem.

### Minimum Level

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

### Weight

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

## Category Page

Use the Category page (RC\_CTD\_CATEGORY) to set up case category values.



## Navigation

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

### Image: Category page

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

*Category	Self-Service	*Short Name	Self-Service Description	Long Description		
ACAD	<input checked="" type="checkbox"/>	Academic Affairs	Academic Affairs	Academic Affairs	+	-
ACTY	<input checked="" type="checkbox"/>	Activities	Activities	Activities	+	-
ADMN	<input checked="" type="checkbox"/>	Admissions	Admissions	Admissions	+	-
ALUM	<input checked="" type="checkbox"/>	Alumni Relations	Alumni Relations	Alumni Relations	+	-
ENROL	<input checked="" type="checkbox"/>	Enrollment	Enrollment	Enrollment	+	-
FINAN	<input checked="" type="checkbox"/>	Financial Aid	Financial Aid	Financial Aid	+	-
GRAD	<input checked="" type="checkbox"/>	Graduate Programs	Graduate Programs	Graduate Programs	+	-
JUDGE	<input checked="" type="checkbox"/>	Judicial Affairs	Judicial Affairs	Judicial Affairs	+	-
RLIFE	<input checked="" type="checkbox"/>	Residential Life	Residential Life	Residential Life	+	-
TECH	<input checked="" type="checkbox"/>	Technical Support	Technical Support	Technical Support	+	-

\* Required Field

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

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

## Category Competencies Page

Use the Category Competencies page (RC\_CTD\_CAT\_COMP) to set up case category competency values.

## Navigation

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

### Image: Category Competencies page

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

*Description	*Minimum Level	Weight		
ADA Awareness	3-Good	2	+	-
Ability to listen & respond	3-Good	3	+	-
Accountability for decisions	3-Good	3	+	-

\* Required Field

## Category Competency Information

### Description

Select the competency needed to resolve problems for the displayed category.

### Minimum Level

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

### Weight

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

## Type Page

Use the Type page (RC\_CTD\_TYPE) to set up case specialty types.

### Navigation

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

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

### Image: Type page

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

The screenshot shows the 'Type' page in a web application. The page has a header with tabs: Category, Category Competencies, Type, Type Competencies, Detail, and Detail Competencies. Below the tabs, there is a section for 'SetID' (PSUNV) and 'Description' (PeopleSoft University). The main content area is titled 'Specialty Types' and contains a table with the following columns: \*Specialty Type, Self-Service, \*Short Name, Self-Service Description, and Long Description. The table lists 16 specialty types, each with a Self-Service checkbox and corresponding descriptions. The page includes navigation controls at the top right (Customize, Find, First, 1-46 of 46, Last) and a footer note: '\* Required Field'.

*Specialty Type	Self-Service	*Short Name	Self-Service Description	Long Description
ACAL	<input checked="" type="checkbox"/>	Academic Calendar	Academic Calendar	Academic Calendar
ACCS	<input type="checkbox"/>	Network Access	Network Access	Network Access
ACDP	<input checked="" type="checkbox"/>	Academic Programs	Academic Programs	Academic Programs
ADMN	<input checked="" type="checkbox"/>	Admissions	Admissions	Admissions
ADVS	<input checked="" type="checkbox"/>	Advising	Advising	Advising
AMEM	<input checked="" type="checkbox"/>	Assoc Membership	Association Membership	Association Membership
APEAL	<input checked="" type="checkbox"/>	Appeals	Appeals	Appeals
APPL	<input checked="" type="checkbox"/>	Application	Application	Application
ATHL	<input checked="" type="checkbox"/>	Athletics	Athletics	Athletics
BEHV	<input checked="" type="checkbox"/>	Behavioural Issue	Behavioural Issue	Behavioural Issue
CAB	<input checked="" type="checkbox"/>	Network Cable	Network Cable	Network Cable
CCERT	<input checked="" type="checkbox"/>	Comp Certification	Computer Certification	Computer Certification
CLBS	<input checked="" type="checkbox"/>	Club Sports	Club Sports	Club Sports
CLOAD	<input checked="" type="checkbox"/>	Course Load	Course Load	Course Load
CMPL	<input checked="" type="checkbox"/>	Computer Lab	Computer Lab	Computer Lab

\* Required Field

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

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

## Type Competencies Page

Use the Type Competencies page (RC\_CTD\_TYPE\_COMP) to set up case specialty type competencies.

## Navigation

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

### Image: Type Competencies page

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

Category Category Competencies Type Type Competencies Detail Detail Competencies

SetID PSUNV Description PeopleSoft University

Specialty Type Find View All First 4 of 46 Last

Specialty Type Description

Specialty Type Admissions

Specialty Type Competencies Customize Find View All 1-3 of 3 Last

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

\* Required Field

## Specialty Type Competency Information

### Description

Select the competency needed to resolve problems for the displayed specialty type.

### Minimum Level

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

### Weight

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

## Detail Page

Use the Detail page (RC\_CTD\_DETAIL) to set up case details.

## Navigation

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

### Image: Detail page

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

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

\* Required Field

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

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

## Detail Competencies Page

Use the Detail Competencies page (RC\_CTD\_DETAIL\_COMP) to set up case detail competencies.

## Navigation

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

### Image: Detail Competencies page

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

Category Category Competencies Type Type Competencies Detail Detail Competencies

SetID PSUNV Description PeopleSoft University

Details Find View All First 5 of 100 Last

Detail Description

Detail Advisor

Detail Competencies Customize Find View All 2-4 of 4 Last

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

\* Required Field

## Detail Competency Information

### Description

Select the competency needed to resolve problems for the displayed detail.

### Minimum Level

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

### Weight

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

## Combine Category/Type/Detail Page

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

## Navigation

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

### Image: Combine Category/Type/Detail page

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

**Combine Category/Type/Detail**

Save | Edit Category | Edit Type | Edit Detail |

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

**Search**

Use Saved Search

\*SetID =  PSUNV PeopleSoft University

Category =  RLIFE Residential Life

Specialty Type =

Detail =

Status =  Active

Start Date >=

End Date <=

Search Clear Save Search Criteria Delete Saved Search Personalize Search

**Category/Type/Detail Result** Customize | Find | First 1-7 of 7 Last

Select	Category	Specialty Type	Detail	Start Date	End Date	Status			
<input type="checkbox"/>	Residential Life	Health Care	Health Center	09/23/2008		Active			
<input type="checkbox"/>	Residential Life	Housing	Dormitory	09/23/2008		Active			
<input type="checkbox"/>	Residential Life	Housing	Off-Campus Housing	09/23/2008		Active			
<input type="checkbox"/>	Residential Life	Housing	Wait List	09/23/2008		Active			
<input type="checkbox"/>	Residential Life	Other	Campus ID Cards	09/23/2008		Active			
<input type="checkbox"/>	Residential Life	Parking	Parking Issues	09/23/2008		Active			
<input type="checkbox"/>	Residential Life	Parking	Parking Permit	09/23/2008		Active			

☐ Check All / Clear All

Clone Update Start Date Inactivate Re-activate Delete

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

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

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

## Search

### Use Saved Search

Select a set of saved search criteria that you wish to execute.

### Save Search Criteria

Click this link to name and save a set of search criteria for future use.

**Delete Saved Search**

Click this link to delete an existing saved set of search criteria.

**Category/Type/Detail Result****Category Description**

Select the category for which you wish to define valid specialty types and details

**Specialty Type**

Select a specialty type that you wish to make available for the specified category value.

**Detail**

Select a detail that you wish to make available for the specified category and specialty type values.

**Start Date**

Enter the start date on which the specified category, specialty type and detail value combination will become valid.

**End Date**

The date after which the specified category, specialty type and detail value combination will no longer be valid. Cases created after this date will no longer be able to use this combination. Users do not enter end dates directly into the grid: end dates are displayed after a user selects one or more rows and clicks the Inactivate button.

**Status**

Shows the status of a particular combination defined on a row in the grid. Users do not enter values for this field: the status value displayed is based on the start and end dates in effect for that row. Rows with a start date greater than the current date are considered to be in *Pending* status, indicating that these combinations are not yet available on cases. Rows with an end date less than the current date are considered to be in *Inactive* status, and are not available to new cases. Rows whose start date precedes the current date and whose end date is either blank or greater than the current date are considered *Active*.

**(Competencies)**

Click this button to view the competencies for the category, specialty type and detail listed on the row.

---

**Note:** This button is only visible if there competencies exist for at least one of the category, specialty type or detail definitions listed in the search results.

---

**Clone**

Click this button to clone the selected row(s) from the grid. You will be prompted to select which field(s) you do not wish to have cloned from the specified source row(s), since you must specify at least one value on the new row that is different from the source row.

For example, users who wish to define multiple valid detail entries for a given category and specialty type may find it convenient to clone an existing row for that category and specialty type and simply add the desired detail value.



**Update Start Date**

Users may select multiple rows in the grid and update the valid start date for those rows by clicking this button and specifying the new desired start date.

**Inactivate**

Click this button to inactivate the selected row(s) from the grid. All selected rows will be given an end date equal to the current date, and the corresponding category, specialty type and detail combinations will no longer be available on cases opened after that date.

Note that a combination cannot be inactivated if it is currently used by an open case, a case default, a quick code or an AAF policy action.

**Reactivate**

Click this button to reactivate the selected row(s) from the grid. All selected rows will be given a blank end date and a start date equal to the current date.

**Delete**

Use this button to delete the selected row(s) from the grid. A combination may not be deleted if it is currently used in an open case, a quick code, a business unit default, or an AAF policy action.

**Combine Category/Type/Detail: Competencies Page**

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

## Navigation

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

### Image: Combine Category/Type/Detail: Competencies page

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

**Combine Category/Type/Detail**

**Competencies**

**SetID** PSUNV      **Description** PeopleSoft University

**Category** Residential Life

**Category Competencies Information**

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

**Specialty Type** Housing

**Type Competencies Information**

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

**Detail** Dormitory

**Detail Competencies Information**

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

OK    Cancel    Apply

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

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

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

## Quick Code Page

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

**Navigation**

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

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

### Image: Quick Code page (1 of 3)

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

Quick Code

Quick Code 103 Business Unit HRH DU

Quick Code Description

Find | View All First 1 of 1 Last

\*Effective Date 08/19/2002

\*Description Update Personal Info-PSFT

\*Status Active

Usage Count 1507 Last Used 03/06/2013

Problem Information

Field Label	Value	Overwrite
Problem Summary	Update personal information	<input checked="" type="checkbox"/>
Description	Employee would like to update personal information.	<input checked="" type="checkbox"/>

Case Information

Field Label	Value	Overwrite
Case Type	Administrative	<input checked="" type="checkbox"/>
Case Subtype	Update Info	<input checked="" type="checkbox"/>
Case Status	Open - Research	<input checked="" type="checkbox"/>
Provider Group	General Inquiries	<input checked="" type="checkbox"/>
Assigned To		<input checked="" type="checkbox"/>
Product Group		<input type="checkbox"/>

**Image: Quick Code page (2 of 3)**

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

<b>Product ID</b>	<input type="text"/>		<input type="checkbox"/>
<b>Product Description</b>			
<b>Category</b>	Employee Management		<input checked="" type="checkbox"/>
<b>Specialty Type</b>	Personal Information		<input checked="" type="checkbox"/>
<b>Detail</b>	Update Info		<input checked="" type="checkbox"/>
<b>Case Priority</b>	Low		<input checked="" type="checkbox"/>
<b>Case Impact</b>			<input type="checkbox"/>
<b>Urgency</b>			<input type="checkbox"/>
<b>Case Severity</b>	One Affected		<input checked="" type="checkbox"/>
<b>Error Code</b>	<input type="text"/>		<input type="checkbox"/>
<b>Error Message</b>			
<b>Suggested Action</b>			
<b>Field Label</b>	<b>Value</b>	<b>Overwrite</b>	
<b>Link Category</b>	Human Resources		<input checked="" type="checkbox"/>
<b>Version</b>	(Invalid Value)		
<b>Link Name</b>	HRMS - Personal Data		

**Image: Quick Code page (3 of 3)**

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

Solution		
Field Label	Value	Overwrite
Keyword or Phrase	<input type="text"/>	<input checked="" type="checkbox"/>
Solution	3015	
Solution Summary	How to update your Personal Information	
Solution Status	Successful Resolution	

Display Template	
Template Family	<input type="text"/>
Display Template ID	<input type="text"/>

Note	
Note Summary	<input type="text"/>
Description	<input type="text"/>

Interested Parties			Personalize	Find			First	1 of 1	Last
Person ID	Name	Reason Code							
1 <input type="text"/>		<input type="text"/>							

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

**Quick Code**

This page displays a unique code that agents can use to populate multiple fields on the Case page automatically.

**Business Unit**

Displays the business unit of the call center that uses this quick code.

**Quick Code Description****Description**

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

**Usage Count**

Displays the number of times this quick code has been used to populate default values in cases.

When you select a quick code to use in a case, at save time, the system increases the quick code usage count by 1 and updates the code's last used date to the current date. The same update applies when a case using this quick code is saved through component interface.

The usage count provides the information needed to determine if a quick code is being utilized. You can then decide if you want to make modifications to increase usability or inactivate it accordingly.

---

**Note:** If the quick code definition is updated using the Correct History mode, the usage count and last used values are not reset; however, if you add a new effective-dated row to the quick code definition, the system resets the usage count and the last used date of the new row to zero and null respectively.

---

### Last Used

Displays the date this quick code was last used. When you select a quick code to use in a case, at save time, this field is updated to the current date.

### Overwrite

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

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

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

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

## Problem Information

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

<b>Problem Summary</b>	Enter the summary associated with this quick code.
<b>Description</b>	Enter the description associated with this quick code.

## Case Information

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

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

<b>Link Category</b>	Select the link category to be associated with a case.
<b>Version</b>	Select the link category's version to be assigned to a case.



<b>Link Name</b>	Select the link name to be associated with a case.
<b>Solution</b>	
<b>Keyword or Phrase</b>	Enter the keywords to be associated with a case. These keywords appear in the Search subtab on the Solutions page of the Case component, thus driving the search for solutions for the case.
<b>Solution</b>	<p>Click to select a solution to be associated with this quick code. When this quick code is selected for a case, the chosen solution appears on the Attempted Solutions section on the Solutions page of the case.</p> <p>Only solutions that meet all these conditions are available for selection:</p> <ul style="list-style-type: none"> <li>• Solutions in the same setID as the quick code</li> <li>• Solutions that are active based on their start and end dates and the effective date of the quick code.</li> </ul> <hr/> <p><b>Note:</b> When you select a solution for a quick code, you must also select a status for the solution. An error message appears if only one of these field has a value but not both.</p> <hr/>
<b>Solution Summary</b>	Displays the summary text of the selected solution.
<b>Solution Status</b>	<p>Select the initial status for the solution to appear on the Solution page of the Case component. Values are:</p> <p><i>Failed Resolution</i></p> <p><i>In Consideration</i></p> <p><i>Successful Resolution</i></p> <p><i>Waiting on Customer</i></p> <p><i>Withdrawn</i></p> <hr/> <p><b>Note:</b> When you select a solution status, you must also select a solution to which the status applies. An error message appears if only one of these field has a value but not both.</p> <hr/>

See "Case - Solution Page, Service Order - Solution Page or Quality Management - Solutions Page (PeopleSoft CRM 9.2: Services Foundation)".

## Display Template

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

---

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

---

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

## Notes

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

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

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

See "Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Interested Parties

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

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

**Reason Code** Select the reason the interested party should be listed as an interested party on the case.

---

## Setting Up Problem Codes for Material Returns

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

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

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## Page Used to Set Up Problem Codes

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Problem Codes	RF_PROBLEM_CD	Set Up CRM, Common Definitions, Codes and Auto Numbering, Problem Codes, Problem Codes	Set up the problem codes used to identify reasons for material returns on the RMA form.

## Related Links

[Understanding Material Return Processing](#)

## Problem Codes Page

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

### Navigation

Set Up CRM, Common Definitions, Codes and Auto Numbering, Problem Codes, Problem Codes

### Image: Problem Codes page

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

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

Add Problem Code

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

See *PeopleSoft FSCM: Application Fundamentals*

## Setting Up Reason Codes

This section discusses how to set up reason codes.

## Page Used to Set Up Reason Codes

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

## Reason Code Page

To set up reason codes, use the Reason Code (RB\_REASON\_CD) component.

Use the Reason Code page (RB\_REASON\_CD) to create reason codes for various actions.

### Navigation

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

### Image: Reason Code page

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

The screenshot shows the 'Reason Code' page. At the top, there are two tabs: 'SetID PSUNV' and 'Reason Code CASECLOSED'. Below the tabs is a section titled 'Reason Code Definition'. This section contains several fields: '\*Effective Date' with a date picker set to 06/11/2008, '\*Reason Type' with a dropdown menu set to 'Reason Closed', '\*Description' with a text box containing 'Case Resolved', and 'Self-Service Description' with a text box containing 'Case Resolved'. To the right of the 'Effective Date' field is a 'Status' dropdown menu set to 'Active'. There are also '+', '-', and 'X' buttons next to the 'Status' dropdown. At the bottom of the 'Reason Code Definition' section is an 'Audit History' section with a right-pointing arrow. The page has a search bar at the top right with 'Find | View All | First | 1 of 1 | Last'.

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

## Setting Up Case Relationship Types and Labels

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

## Page Used to Set Up Case Relationship Types and Labels

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

### Case Relationship Type Page

To set up case relationship types and labels, use the Case Relationship Type (RC\_RELATION\_TYPE) component.

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

#### Navigation

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

#### Image: Case Relationship Type page

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

### Case Relationship Type

Relationship Type GLOBE

SetID CRM01

General

\*Short Name Global

Long Description Global

Relationship

☒ Hierarchical

Parent Label Parent

Child Label Child

Equivalent Label

Behavior

☒ Set Parent As Global Case

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

Modified 03/02/2001 2:43PM PST DVP1

\* Required Field

## 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 you select the Hierarchical check box.

### Equivalent Label

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

You can enter information into this field only if you clear the Hierarchical check box.

## Behavior

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

### Set Parent as Global Case

When a case relationship is created, if the corresponding relationship type has this check box selected, then the Global Case check box will be automatically selected and updated on the parent case of the new relationship.

### Set status of child case using Duplicate Case Status from the Business Unit Defaults

When a case relationship is created, if the relationship type has this check box selected, then the child case status will be automatically set to the Duplicate Case Status value specified in the Call Center Business Unit Defaults page.

---

**Note:** If this check box is selected but no Duplicate Case Status value has been specified on the Call Center Business Unit Defaults page, no automatic status update will be made on the child case.

---

## Example

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

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

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

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

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

---

## Setting up Case Matching Criteria

To set up case matching criteria, use the Case Match Definition (RC\_CASE\_MATCH) component.

### Pages Used to Define Matching Criteria

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Match Detail	RC_MATCH_DETAIL	Set Up CRM, Product Related, Call Center, Case Match Definition, Match Detail	Specify the criteria to be used to match a case with other existing cases.
Match Usage	RC_MATCH_USAGE	Set Up CRM, Product Related, Call Center, Case Match Definition, Match Usage	Specify the business units and provider groups to which the match criteria should apply.

### Match Detail Page

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

## Navigation

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

### Image: Match Detail page (1 of 2)

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

**Match Detail** **Match Usage**

**Match ID** HRDUPMATCH **Description** HRHD Duplicate Match Rule

**Case Filter Criteria**

☐ **Global Case**

\* **Includes Case Search from Past Period (Months)** 99

**Case Match Status** [Customize](#) | [Find](#) | [2](#) | [First](#) | [1-5 of 5](#) | [Last](#)

*SetID	Description	*Case Status	Description		
HRU01	HR Help Desk USA	Open-Chg Request	Open - Change Request	+	-
HRU01	HR Help Desk USA	Open-Case Escalated	Open- Case Escalated	+	-
HRU01	HR Help Desk USA	Open - Pending HR	Open - Pending HR	+	-
HRU01	HR Help Desk USA	Open - New	Open - New	+	-
HRU01	HR Help Desk USA	Open - Research	Open - Research	+	-

**Case Match Criteria**

**Customer**

☐ Customer

☐ Contact

☐ Site

☐ Region

**Employee**

☒ Employee ID

☐ Department

☐ Location

### Image: Match Detail page (2 of 2)

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

**Product**

☐ Product

☐ Serial

☐ Asset Tag

**Information**

☐ Case Type

☐ Sub Type

☐ Category

☐ Specialty Type

☐ Detail

☐ Provider Group

**Incident Location**

☐ Address

☐ Intersection

**Keyword Search**

**Minimum Score(%)** 50

☒ **Enable Keyword Search**



## Case Filter Criteria

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

## Case Match Criteria

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

## Incident Location

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

## Keyword Search

<b>Minimum Score (%)</b>	The minimum score returned from the PeopleSoft Search to qualify a case as a match.
<b>Enable Keyword Search</b>	Select to enable keyword search on case match. If this check box is selected, the system will search the case Summary and Case Detail field values from other cases to match the words in the Summary field of the case from which the search has been initiated.
<hr/> <b>Note:</b> If this check box is selected, only cases that exceed or equal the minimum score are considered. These results must also meet all the other case match criteria specified on this page. <hr/>	

## Match Usage Page

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

## Navigation

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

### Image: Match Usage page

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

## Business Unit Match Coverage

### Business Unit

Specify the business unit for which this set of matching criteria (defined on the Match Definition page) should apply.

### Relationship Type

Select the relationship type that should be made available for the selected business unit when presenting case matches.

## Provider Group Match Coverage

### Provider Group SetID

Specify the SetID of the associated provider group for which this set of matching criteria (defined on the Match Definition page) should apply.

### Provider Group Name

Specify the provider group for which this set of matching criteria (defined on the Match Definition page) should apply.

### Relationship Type

Select the relationship type that should be made available for the selected provider group when presenting case matches.

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

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

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

---

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

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## Chapter 4

# Setting Up RMA Processing

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## Understanding RMA in PeopleSoft Support

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

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

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

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## Activating the Required Service Operations

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

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

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

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

---

## Defining Items

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

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

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

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

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

### Related Links

"Understanding Item Definition in PeopleSoft CRM (*PeopleSoft CRM 9.2: Product and Item Management*)"

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## Defining Defaults and Procurement Options for Requisition Processing

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

See *PeopleSoft FSCM: Purchasing*

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

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

See *PeopleSoft FSCM: Inventory*

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

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

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## Defining Valid Requisition Requester IDs

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

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

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

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**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.

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

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## Setting Up Links to PeopleSoft Purchasing and PeopleSoft Inventory

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

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

---

## Synchronizing Problem Codes and Reason Codes

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

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

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

### **Related Links**

[Understanding Call Center Prompt Tables](#)

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## **Viewing RMA Statuses**

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

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

---

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

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

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

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

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



# Setting Up Links and Related Actions

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## Understanding Link Setup

This section discusses:

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

## Basic Link Setup

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

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

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

1. Link group.

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

2. Link category.

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

3. Link definitions.

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

## Link Setup for PeopleSoft HelpDesk for Human Resources Users

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

- Set up a node for each database server.

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

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

*See PeopleTools: Portal Technology*

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

---

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

---

## Link Presentation on the Case Page

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

The group box displays:

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

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

---

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

---

## Link Groups Delivered by the PeopleSoft System

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

<i>Link Group ID</i>	<i>Description</i>
GOV	Government

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

## Link Categories Delivered by the PeopleSoft

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

<b>Link Category</b>	<b>Link Version</b>	<b>Action Flag</b>	<b>Long Description</b>	<b>Description</b>
ACAD	9.1	Active	Academics	Academic
ADM	9.1	Active	Admissions	Admission
BENEF	8.0 SP1	Inactive	Benefits	Benefits
BENEF	8.3	Inactive	Benefits	Benefits
BENEF	8.8	Inactive	Benefits	Benefits
BENEF	8.9	Inactive	Benefits	Benefits
BENEF	9.0	Inactive	Benefits	Benefits
BENEF	9.1	Active	Benefits	Benefits
CR	9.1	Active	Contributor Relations	Contributor Relation
CS	9.1	Active	Campus Community	Campus Community
EBABS	12.1	Active	Absences	Absences
EBASN	12.1	Active	Assignment	Assignment
EBCMP	12.1	Active	Manage Benefits	Manage Benefits
EBHR	12.1	Active	Personal	Personal
EBMWK	12.1	Active	Maintain Worker	Maintain Worker

<b>Link Category</b>	<b>Link Version</b>	<b>Action Flag</b>	<b>Long Description</b>	<b>Description</b>
EBPAY	12.1	Active	Manage Payroll	Manage Payroll
EBPUK	12.1	Active	Tax and Statutory	Tax and Statutory
FIN	9.1	Active	Financials	Financial
HRMS	8.O SP1	Inactive	HRMS	Human Resources
HRMS	8.3	Inactive	HRMS	Human Resources
HRMS	8.8	Inactive	HRMS	Human Resources
HRMS	8.9	Inactive	HRMS	Human Resources
HRMS	9.0	Inactive	HRMS	Human Resources
HRMS	9.1	Active	HRMS	Human Resources
PAYR	8.0 SP1	Inactive	Payroll	Payroll
PAYR	8.3	Inactive	Payroll	Payroll
PAYR	8.8	Inactive	Payroll	Payroll
PAYR	8.9	Inactive	Payroll	Payroll
PAYR	9.0	Inactive	Payroll	Payroll
PAYR	9.1	Active	Payroll	Payroll
RELA	Other	Active	Related Actions	Related Actions
SACT	Other	Active	Suggested Actions	Suggested Actions
STOCK	8.O SP1	Inactive	Stock	Stock
STOCK	8.3	Inactive	Stock	Stock
STOCK	8.8	Inactive	Stock	Stock
STOCK	8.9	Inactive	Stock	Stock
STOCK	9.0	Inactive	Stock	Stock
STOCK	9.1	Active	Stock	Stock
TRNG	8.O SP1	Inactive	Training	Training
TRNG	8.3	Inactive	Training	Training
TRNG	8.8	Inactive	Training	Training
TRNG	8.9	Inactive	Training	Training

<b>Link Category</b>	<b>Link Version</b>	<b>Action Flag</b>	<b>Long Description</b>	<b>Description</b>
TRNG	9.0	Inactive	Training	Training
TRNG	9.1	Active	Training	Training

## Link Definitions Delivered by the PeopleSoft System (Content References)

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

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

### Link Definitions for PeopleSoft HCM 9.1

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

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

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMM_GBL7	WF_JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	LNMGGB	Maintain Loans – GBR	HC_GPGB_EE_LOANS_GBL	GPGB_EE_LOAN_DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_LOAN_RV_GBL	GPGB_EE_LOAN_RV	EMPLID
PAYR	LONFR	Request Loans - FRA	HC_GPFR_LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ONPAY_GBL	GPFR_ONPAY_SUM	EMPLID

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



## Link Definitions for PeopleSoft HCM 9.0

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

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	BENE	Election Entry	HC_BAS_ ELECTION_ ENTRY_GBL	BAS_ELECT_ EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_ SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ ALLOCATION_ GBL	CAR_ ALLOCATION	EMPLID
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_ GBL	CAR_PLAN	EMPLID
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_ BENEF_GBL1	DEPEND_ BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_ _BENEFIT_GBL	DISABILITY_ BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_ DEM_EM_PG_ GBL	BAS_ON_DEM_ EM	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_ BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_ BENEFITS_GBL4	HEALTH_ BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_ BENEF_GBL	LIFE_ADD_ BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_ PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan ( USA)	HC_US_PENSION_ _PLANS_GBL	PENSION_PLAN1	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	LNMGGB	Maintain Loans – GBR	HC_GPGB_EE_LOANS_GBL	GPGB_EE_LOAN_DT	EMPLID
PAYR	LNRGB	Review Loans – GBR	HC_GPGB_EE_LOAN_RV_GBL	GPGB_EE_LOAN_RV	EMPLID
PAYR	LONFR	Request Loans - FRA	HC_GPFR_LOANS_GBL	GPFR_LOANS	EMPLID
PAYR	NTPAY	Net Pay Elections	HC_GP_NET_DIST_GBL	GP_NET_DIST	EMPLID
PAYR	PAYFR	Payslip - FRA	HC_GPFR_ONPAY_GBL	GPFR_ONPAY_SUM	EMPLID
PAYR	PAYGB	Payslip - GBR	HC_GPGB_PSLIP_PU_PNLG_GBL	GPGB_PSLIP_PU	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_LINE_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_LINE_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID

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

## Link Definitions for PeopleSoft HCM 8.9

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

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	BENE	Election Entry	HC_BAS_ ELECTION_ ENTRY_GBL	BAS_ELECT_ EVENT	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_ _SUMMARY_ GBL9	BENEFITS_ SUMMARY1	EMPLID
BENEF	CARAL	Car Allocation	HC_CAR_ ALLOCATION_ GBL	CAR_ ALLOCATION	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	CARPL	Car Benefit	HC_CAR_PLAN_GBL	CAR_PLAN	EMPLID
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS_CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
HRMS	CNTRC	Update Contracts	HC_CONTRACT_DATA_GBL1	CONTRACT1	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA2	EMPLID
PAYR	ABSGB	Absence Event - GBR	HC_GPGB_ABS_EVENT_GBL	GPGB_ABS_EVENT_1	EMPLID
PAYR	ABSGP	Absence Event	HC_GP_ABS_EVENT_GBL	GP_ABS_EVENT	EMPLID
PAYR	BKACT	Bank Accounts	HC_PYE_BANKACCT_GBL7	PYE_BANKACCT	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GARFR	Garnishments - FRA	HC_GPFR_GAR_DAT_GBL	GPFR_GAR_DAT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
STOCK	STKEX	Stock Exercise	HC_ST_EXER_ SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_ _STOK002_GBL9	ST_RUNCTL_ STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_ STUDENT_CRS_ DT2_GBL	COURSE_ STUDENT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_ STUDENT_CRS_ SU3_GBL	TRN_STUDENT_ CRS_SUM	EMPLID

### Link Definitions for PeopleSoft HCM 8.8

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

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

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



<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan ( USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan ( CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
TRNG	CENRL	Course Enrollment	HC_TRN_STUDENT_CRS_DT2_GBL	COURSE_STUDENT_ENRL	EMPLID
TRNG	TRNSU	Training Summary	HC_TRN_STUDENT_CRS_SU3_GBL	TRN_STUDENT_CRS_SUM	EMPLID

### Link Definitions for PeopleSoft HCM 8.3

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

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	BENE	Election Entry	HC_BAS_ELECTION_ENTRY_GBL	BAS_ELECT_EVENT 1	EMPLID
BENEF	BENS	Benefits Summary	HC_BENEFITS_SUMMARY_GBL9	BENEFITS_SUMMARY1	EMPLID
BENEF	DEBEN	Dependent/ Beneficiaries	HC_DEPEND_BENEF_GBL1	DEPEND_BENEF1	EMPLID
BENEF	DISP	Disability Plans	HC_DISABILITY_BENEFIT_GBL	DISABILITY_BENEFIT	EMPLID
BENEF	EVENT	Create Event	HC_BAS_ON_DEM_EM_PG_GBL	BAS_ON_DEM_EM	EMPLID
BENEF	FSACA	FSA Plans (CAN)	HC_FSA_BENEFITS_CAN_GBL	FSA_BENEFITS	EMPLID
BENEF	FSAUS	FSA Plans (USA)	HC_FSA_BENEFITS_GBL	FSA_BENEFITS	EMPLID
BENEF	HLTH	Health Plans	HC_HEALTH_BENEFITS_GBL4	HEALTH_BENEFITS1	EMPLID
BENEF	L/ADD	Life/ADD Plans	HC_LIFE_ADD_BENEF_GBL	LIFE_ADD_BENEF1	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	LEAP	Leave Plans (USA)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	PENSION_PLAN1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DED_DATA_USA8	GENL_DED_DATA	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
PAYR	GENDC	General Deduct - CAN	HC_GENL_DED_DATA_CAN	GENL_DED_DATA	EMPLID
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GENL_DED_DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_ADD_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
PAYR	TAXUS	Tax Data - US	HC_TAX_DATA_USA6	TAX_DATA1	EMPLID
STOCK	STKEX	Stock Exercise	HC_ST_EXER_SRCH_GBL	ST_EXER_SRCH1	EMPLID
STOCK	STOCA	Stock Activity	HC_ST_RUNCTL_STOK002_GBL9	ST_RUNCTL_STOK002	EMPLID
TRNG	CENRL	Course Enrollment	HC_TRN_STUDENT_CRS_DT2_GBL	COURSE_STUDENT_ENRL	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
TRNG	TRNSU	Training Summary	HC_TRN_ STUDENT_CRS_ SU3_GBL	TRN_STUDENT_ CRS_SUM	EMPLID

## Link Definitions for PeopleSoft HCM 8.0 SP1

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

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

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
BENEF	LEAPC	Leave Plans (CAN)	HC_LEAVE_PLANS_GBL	LEAVE_PLANS	EMPLID
BENEF	PENUS	Pension Plan (USA)	HC_US_PENSION_PLANS_GBL	US_PLAN_1	EMPLID
BENEF	PPCAN	Pension Plan (CAN)	HC_PENSION_PLAN_GBL5	PENSION_PLAN1	EMPLID
BENEF	RETP	Retirement Plans	HC_RTRMNT_PLANS_GBL	RTRMNT_PLANS	EMPLID
BENEF	SAVP	Savings Plans	HC_SAVINGS_PLANS_GBL	SAVINGS_PLANS1	EMPLID
BENEF	VACP	Vacation Plans	HC_VACATION_BENEFIT_GBL	VACATION_BENEFIT	EMPLID
HRMS	EMERC	Emergency Contacts	HC_EMERGENCY_CONTACT_GBL4	EMERGENCY_CONTACT	EMPLID
HRMS	JOB_D	Job Data Information	HC_JOB_DATA_GBL	JOB_DATA1	EMPLID
HRMS	JOBS	Job Summary	HC_JOB_SUMMARY_GBL7	JOB_SUMMARY	EMPLID
HRMS	PERSD	Personal Data	HC_PERSONAL_DATA_GBL7	PERSONAL_DATA1	EMPLID
PAYR	DIRDC	Direct Deposit - CAN	HC_DIRECT_DEPOSIT_CAN_CAN	DIRECT_DEPOSIT_CAN	EMPLID
PAYR	DIRDF	Direct Deposit - USF	HC_DIRECT_DEPOSIT_USA3	DIRECT_DEPOSIT	EMPLID
PAYR	DIRDU	Direct Deposit - US	HC_DIRECT_DEPOSIT_USA5	DIRECT_DEPOSIT	EMPLID
PAYR	GEND	General Deduct - US	HC_GENL_DEDUCT_USA8	GENL_DEDUCT_DATA	EMPLID
PAYR	GENDC	General Deduct - CAN	HC_GENL_DEDUCT_CAN	GENL_DEDUCT_DATA	EMPLID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
PAYR	GENDU	General Deduct - USF	HC_GENL_DED_DATA_USF	GVT_GENL_DED_DATA	EMPLID
PAYR	PAYSC	Paysheet - CAN	HC_PAY_SHEET_ADD_CAN	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSF	Paysheet - USF	HC_PAY_SHEET_ADD_USA9	PAY_SHEET_ADD_S	EMPLID
PAYR	PAYSU	Paysheet - US	HC_PAY_SHEET_ADD_USA8	PAY_SHEET_ADD_S	EMPLID
PAYR	PCHK	Paycheck - US	HC_PAY_CHECK_USA5	PAY_CHECK_E	EMPLID
PAYR	PCHKC	Paycheck - CAN	HC_PAY_CHECK_CAN2	PAY_CHECK_E	EMPLID
PAYR	PCHKU	Paycheck - USF	HC_PAY_CHECK_USF4	PAY_CHECK_E	EMPLID
PAYR	SAVB	Savings Bond - US	HC_SAVINGS_BOND_LOG_USA	SAVINGS_BOND_LOG	EMPLID
PAYR	TAXCA	Tax Data - CAN	HC_TAX_DATA_CAN_CAN	TAX_DATA_CAN1	EMPLID
PAYR	TAXSF	Tax Data - USF	HC_TAX_DATA_USA2	TAX_DATA1	EMPLID
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 Campus Solutions

This table lists the link definitions delivered by PeopleSoft CRM

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
ACAD	ACD01	Academic Requirements	HC_RQ_SUMMARY_ACAD_GBL		EMPID
ACAD	ACD02	Academics Summary	HC_ACAD_SUMMARY_GBL	SCC_SUM_ACADEMICS	EMPID
ACAD	ACD03	Enrollment Summary	HC_STDNT_ENRL_INQ_GBL		EMPID
ACAD	ACD04	Quick Enroll Classes	HC_QUICK_ENROLL_GBL		EMPID
ACAD	ACD05	Search Classess	HC_CLASS_SEARCH_GBL4		EMPID
ACAD	ACD06	Search Course Catalog	HC_SSS_BROWSE_CATLG_GBL3		EMPID
ACAD	ACD07	Exam Schedule	HC_EXAM_SCHEDULE_GBL	SSR_SSENRL_TERM	EMPID
ACAD	ACD08	Student Grades	HC_STDNT_GRADE_INQ_GBL		EMPID
ACAD	ACD09	Request Transcript	HC_TSCRPT_RQST_GBL		EMPID
ACAD	ACD10	Request Advisement Report	HC_SAA_RPT_RQST		EMPID
ACAD	ACD11	Transfer Course Credit	HC_TRNS_CRSE_MNL_GBL		EMPID
ACAD	ACD12	Transfer Test Credits	HC_TRNS_TEST_MNL_GBL		EMPID
ACAD	ACD013	Transfer Other Credits	HC_TRNS_OTHR_GBL		EMPID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
ADM	ADM10	Admission Applications	HC_ADM_APPL_MAINTNCE_GBL1		EMPID
ADM	ADM20	Test Results	HC_ACAD_TST_RSLT_PERS_GBL		EMPID
ADM	ADM30	External Education	HC_ACAD_HISTORY_PERS_GBL		EMPID
CR	CR10	Contributor Profile	HC_AV_PRSN_BIO_DEMO_GBL		EMPID
CR	CR20	Relationship Summary	HC_AV_CNST_RELATION_GBL		EMPID
CR	CR30	Giving History	HC_AV_P_GPROFILE_GBL		EMPID
CS	CS10	Student Services Center	HC_SCC_STDCTR_ADMIN	SSS_STUDENT_CENTER	EMPID
CS	CS100	Comment Summary	HC_OPR_3C_SUM_PERS_GBL3		EMPID
CS	CS20	Constituent Addresses	HC_ADDRESS_MAINT_GBL2		EMPID
CS	CS30	Constituent Electronic Address	HC_E_MAIL_ADDR_PERS_GBL		EMPID
CS	CS40	Constituent Phones	HC_PHONE_PERS_GBL		EMPID
CS	CS50	Emergency Contact	HC_EMERG_NTC_SA_PERS_GBL		EMPID
CS	CS60	Manage Service Indicators	HC_SCC_SI_SUMRY_PERS		EMPID
CS	CS70	Affiliations	HC_SCC_AFL_ADDUPD_GBL		EMPID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Page Name</b>	<b>Search Key</b>
CS	CS80	Checklist Summary	HC_CHKLST_SUMM_PERS_GBL5		EMPID
CS	CS90	Communication Summary	HC_COMM_SUMMARY_PERS_GBL4		EMPID
FIN	FIN10	Financial Aid Status	HC_SS_FA_AU_STATUS_GBL		EMPID
FIN	FIN20	View Term Award Summary	HC_STDNT_AWRD_INQUIRY_GBL		EMPID
FIN	FIN30	View Anticipated Aid by Term	HC_ANTICIPTD_AID_SUMM_GBL		EMPID
FIN	FIN40	Account Summary	HC_ACCOUNT_VW_GBL4		EMPID
FIN	FIN50	Payment Plan	HC_PAYMENT_PLAN_GBL		EMPID
FIN	FIN60	Tuition Calculation	HC_TUITION_CALC_GBL		EMPID
FIN	FIN70	Pay Tuition Fee	HC_GRP_QUICK_POST_GBL		EMPID
FIN	FIN80	Miscellaneous Fees	HC_OPT_FEE_STDNT_GBL		EMPID

## Link Definitions for Oracle E-Business HCM

This table lists the link definitions delivered by PeopleSoft CRM

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Search Key</b>
EBABS	ABENT	Absences Entry	CR_RC_HRHD_EBS_ABENT	P_PERSON_ID P_BGID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Search Key</b>
EBABS	ABMNG	Absence Management	CR_RC_HRHD_EBS_ABSMAN	P_PERSON_ID P_BGID
EBABS	ACCRV	View Accruals	CR_RC_HRHD_EBS_ACCRUALS	P_PERSON_ID P_BGID
EBASN	ASNEX	Assignment Extra Information	CR_RC_HRHD_EBS_ASSIGNX	P_PERSON_ID P_BGID
EBASN	ASNRT	Assignment Rate	CR_RC_HRHD_EBS_ASSIGNR	P_PERSON_ID P_BGID
EBASN	ASSGN	Assignment	CR_RC_HRHD_EBS_ASSIGNMENT	P_PERSON_ID P_BGID
EBASN	COST	Change Cost Center	CR_RC_HRHD_EBS_CHGCOST	P_PERSON_ID P_BGID
EBASN	HOURS	Change Hours	CR_RC_HRHD_EBS_CHGHR	P_PERSON_ID P_BGID
EBASN	HRVW	HE Views	CR_RC_HRHD_EBS_HRVIEW	P_PERSON_ID P_BGID
EBASN	JOB	Change Job	CR_RC_HRHD_EBS_CHGJOB	P_PERSON_ID P_BGID
EBASN	PREF	Work Preferences	CR_RC_HRHD_EBS_WORKPREF	P_PERSON_ID P_BGID
EBASN	RELIN	Release Information	CR_RC_HRHD_EBS_RELEASE	P_PERSON_ID P_BGID
EBASN	STAT	Worker Status Change	CR_RC_HRHD_EBS_WORKSTAT	P_PERSON_ID P_BGID
EBASN	TENUR	Tenure Status	CR_RC_HRHD_EBS_TENURE	P_PERSON_ID P_BGID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Search Key</b>
EBCMP	BNBAL	Person Benefits Balances	CR_RC_HRHD_EBS_ PERBENBAL	P_PERSON_ID P_BGID
EBCMP	BSASN	Person Benefit Assignment	CR_RC_HRHD_EBS_ PERBENASSIGN	P_PERSON_ID P_BGID
EBCMP	COBRA	COBRA Qualified Beneficiaries	CR_RC_HRHD_EBS_ COBRABEN	P_PERSON_ID P_BGID
EBCMP	COURT	Court Order Form	CR_RC_HRHD_EBS_ COURT	P_PERSON_ID P_BGID
EBCMP	DEPNB	Dependent/Beneficiary	CR_RC_HRHD_EBS_ DEPBEN	P_PERSON_ID P_BGID
EBCMP	ENACT	Person Enrollment Action Items	CR_RC_HRHD_EBS_ ENRLACTION	P_PERSON_ID P_BGID
EBCMP	ENCRT	Enrollment Certifications	CR_RC_HRHD_EBS_ ENRLCERT	P_PERSON_ID P_BGID
EBCMP	ENROL	View Enrollment Results	CR_RC_HRHD_EBS_ ENRLRESULTS	P_PERSON_ID P_BGID
EBCMP	FLEX	Flex Program Enrollment	CR_RC_HRHD_EBS_ FLEX	P_PERSON_ID P_BGID
EBCMP	LIFE	Process Life Events	CR_RC_HRHD_EBS_ LIFEEVENTS	P_PERSON_ID P_BGID
EBCMP	NONFL	Non Flex Program Enrollment	CR_RC_HRHD_EBS_ NONFLEX	P_PERSON_ID P_BGID
EBCMP	OVRRD	Override Plan Enrollment	CR_RC_HRHD_EBS_ ENRLOVER	P_PERSON_ID P_BGID
EBCMP	PERCM	Person Communications	CR_RC_HRHD_EBS_ PERCOM	P_PERSON_ID P_BGID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Search Key</b>
EBCMP	PLENR	Miscellaneous Plan Enrollment	CR_RC_HRHD_EBS_MISC	P_PERSON_ID P_BGID
EBCMP	PRIMC	Primary Care Provider	CR_RC_HRHD_EBS_PRIMCARE	P_PERSON_ID P_BGID
EBCMP	PRTIN	View Participant Information	CR_RC_HRHD_EBS_VPARTINFO	P_PERSON_ID P_BGID
EBCMP	PRTOV	Participation Override	CR_RC_HRHD_EBS_PARTOVR	P_PERSON_ID P_BGID
EBCMP	RECPY	Record Continuing Payments	CR_RC_HRHD_EBS_CONTBEN	P_PERSON_ID P_BGID
EBCMP	REIMB	Reimbursement Requests	CR_RC_HRHD_EBS_REIMBURSE	P_PERSON_ID P_BGID
EBCMP	SAVEN	Savings Plan Enrollment	CR_RC_HRHD_EBS_SAVEPLAN	P_PERSON_ID P_BGID
EBCMP	WHAT	What-if Eligibility	CR_RC_HRHD_EBS_WHATIF	P_PERSON_ID P_BGID
EBHR	ADDR	Address	CR_RC_HRHD_EBS_ADDRESS	P_PERSON_ID P_BGID
EBHR	APPL	Application	CR_RC_HRHD_EBS_APPLICATION	P_PERSON_ID P_BGID
EBHR	CNTCT	Contact	CR_RC_HRHD_EBS_CONTACT	P_PERSON_ID P_BGID
EBHR	COMDL	Communication Delivery Method	CR_RC_HRHD_EBS_COMMDEL	P_PERSON_ID P_BGID
EBHR	EDUCA	Education and Qualification	CR_RC_HRHD_EBS_EDUCATE	P_PERSON_ID P_BGID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Search Key</b>
EBHR	EXINF	Extra Information Type	CR_RC_HRHD_EBS_ XINFO	P_PERSON_ID P_BGID
EBHR	INFO	Personal Information	CR_RC_HRHD_EBS_ PERINFO	P_PERSON_ID P_BGID
EBHR	MEDIC	Medical Assessments	CR_RC_HRHD_EBS_ MEDICALASSESS	P_PERSON_ID P_BGID
EBHR	OTHQL	Other Qualification	CR_RC_HRHD_EBS_ OTHERQUAL	P_PERSON_ID P_BGID
EBHR	PERDT	Enter Person Details	CR_RC_HRHD_EBS_ PERDETAILS	P_PERSON_ID P_BGID
EBHR	PERX	Person Extra Information	CR_RC_HRHD_EBS_ PERSONX	P_PERSON_ID P_BGID
EBHR	PHONE	Phone	CR_RC_HRHD_EBS_ PHONE	P_PERSON_ID P_BGID
EBHR	PICT	Picture	CR_RC_HRHD_EBS_ PICTURE	P_PERSON_ID P_BGID
EBHR	PRVEM	Previous Employment	CR_RC_HRHD_EBS_ PREVEMPL	P_PERSON_ID P_BGID
EBHR	QUALF	Qualification	CR_RC_HRHD_EBS_ QUAL	P_PERSON_ID P_BGID
EBHR	RANK	Academic Rank	CR_RC_HRHD_EBS_ RANK	P_PERSON_ID P_BGID
EBHR	RECOR	Document of Records	CR_RC_HRHD_EBS_ DOCREC	P_PERSON_ID P_BGID
EBHR	SCHOL	School/College Attended	CR_RC_HRHD_EBS_ SCHOOL	P_PERSON_ID P_BGID

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Content Reference</b>	<b>Search Key</b>
EBHR	SPECI	Special Information	CR_RC_HRHD_EBS_ SPECIALINFO	P_PERSON_ID P_BGID
EBHR	SPINF	Special Information Types	CR_RC_HRHD_EBS_ SINFO	P_PERSON_ID P_BGID
EBMWK	MNTCW	Maintaining Contingent Worker	CR_RC_HRHD_EBS_ TMPLCW	P_PERSON_ID P_BGID
EBMWK	MNTEM	Maintaining Employee	CR_RC_HRHD_EBS_ TMPLEMPL	P_PERSON_ID P_BGID
EBMWK	MNTVI	Maintaining Visa	CR_RC_HRHD_EBS_ TMPLVISA	P_PERSON_ID P_BGID
EBPAY	ASSGN	Assignment Process Results	CR_RC_HRHD_EBS_ ASSIGNRES	P_PERSON_ID P_BGID
EBPAY	CMPT	Total Compensation	CR_RC_HRHD_EBS_ TOTALCOMP	P_PERSON_ID P_BGID
EBPAY	EARN	Statement of Earnings	CR_RC_HRHD_EBS_ EARNINGS	P_PERSON_ID P_BGID
EBPAY	EHIST	View Entry History	CR_RC_HRHD_EBS_ ENTRYHIST	P_PERSON_ID P_BGID
EBPAY	ELEM	Element Entries	RC_HRHD_EBS_ ELEMENT	P_PERSON_ID P_BGID P_FUNCNAME
EBPAY	EMVBL	View Employee Balances	CR_RC_HRHD_EBS_ EMPLBALANCE	P_PERSON_ID P_BGID
EBPAY	EXPAY	External/Manual Payments	CR_RC_HRHD_EBS_ MANPAY	P_PERSON_ID P_BGID



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

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

## Link Definitions for PeopleSoft CRM

This table lists the link definitions delivered by PeopleSoft CRM.

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

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Portal CREF</b>	<b>Content Reference</b>	<b>Class Path</b>	<b>Class ID</b>	<b>Search Key</b>	<b>Method</b>
RELA	ASSET	Asset Summary	Employee	CR_RC_ASSET_SUMMARY			cfResource Identifier	
RELA	BPDEF	Defect Workflow	Employee		RC_LINK:APPS_RC	PCode	RC_BUS_PROCESS_ID	Execute Business Project
RELA	BPRJ	Business Project	Employee		RC_LINK:APPS_RC	PCode		ExecuteGen Business Project
RELA	BSCR	Branch Script	Employee		RC_LINK:APPS_RC	PCode		ExecuteGen-Script
RELA	CREQ	Change Request - Create New	Employee		RC_LINK:APPS_RC	PCode		Create Change Request
RELA	EM	Enterprise Manager						
RELA	FRAUD	Case Fraud Workflow			RC_LINK:APPS_RC	PCode	BP_ID	Execute Business Project
RELA	LEAD	Sales Lead	Employee		RC_LINK:APPS_RC	PCode		CreateLead

<b>Category</b>	<b>Link Name</b>	<b>Short Name</b>	<b>Portal CREF</b>	<b>Content Reference</b>	<b>Class Path</b>	<b>Class ID</b>	<b>Search Key</b>	<b>Method</b>
RELA	NDEF	Defect - Create New	Employee		RC_LINK:APPS_RC	PCode		CreateDefect
RELA	OFFR	Offer History						
RELA	ORDER	Sales Order	Employee		RC_LINK:APPS_RC	PCode		CreateSales-Order
RELA	RCREQ <u>Note:</u> Applies only to HelpDesk, not HR HelpDesk	Change Request - Relate	Employee		RC_LINK:APPS_RC	PCode		Relate Change Request
RELA	RDEF	Defect - Relate Existing	Employee		RC_LINK:APPS_RC	PCode		RelateDefect
RELA	REMOT	Remote Control	Employee	CR_RC_REMOTE_CONTROL			cfResource Identifier	
RELA	RMA	Create RMA	Employee		RC_LINK:APPS_RC	PCode		CreateRMA
RELA	SO	Service Order	Employee		RC_LINK:APPS_RC	PCode		CreateSO
RELA	SWDEL	Software Delivery	Employee	CR_RC_SOFTWARE_DELIVERY				
RELA	WEBAD	Asset Administrator	Employee	CR_RC_ASSET_ADMIN			cfResource Identifier	
RELA	WO	Work Order - Create New	Employee		RC_LINK:APPS_RC	PCode		CreateWO
RELA	SRVY	Case Survey			RC_LINK:APPS_RC	PCode		Send Survey

## Setting Up Content References

This section discusses how to:

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

### Pages Used to Set Up Content References

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
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  Click the Add Content Reference link. Access the Security page.	Set up security for content references.

### Setting Up Content References

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

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

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

### Setting Up Security for Content References

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

## Viewing and Modifying Link Definitions

To view and modify link definitions, use the Link Definition (RC\_LINK), Link Category (RC\_LINK\_CAT), and Link Group (RC\_LINK\_GROUP) components.

This section discusses how to:

- View and modify link categories.

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

## Pages Used to View and Modify Link Definitions

Page Name	Definition Name	Navigation	Usage
Link Category Definition	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.
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 Definition Page

Use the Link Category Definition page (RC\_LINK\_CAT\_PNL) to view and modify the categories into which link definitions are organized.

### Navigation

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

### Image: Link Category Definition page

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

### Link Category Definition

Link Category ADM

Version 9.1

#### Link Category Details

Order 20

\*Active Flag Active

\*Short Name Admissions

\*Long Description Admissions

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

Created 03/21/2008 3:49PM PDT By QA

Modified 04/24/2008 2:33PM PDT By lpham

\* Required Field

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

<b>Short Name and Long Description</b>	Enter descriptions to identify the link category you are adding or modifying.
<b>Active Flag</b>	Select either <i>Active</i> or <i>Inactive</i> .
<b>Modify System Data</b>	Click to modify the system data and select or enter information into the Active Flag, Order, Short Name, and Long Description fields. The following message appears: <i>This object was delivered by PeopleSoft but updated by the customer.</i>

## Link Definition Page

Use the Link Definition page (RC\_LINK\_PNL) to view and modify link definitions.

## Navigation

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

### Image: Link Definition page (1 of 2)

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

**Link Definition**

Link Category: ADM      Description: Admissions  
Version: 9.1

**Links** 1-3 of 3

- [Admission Applications](#)
- [Test Results](#)
- [External Education](#)

Create a New Link

**Link Details**

\*Link Name: ADM10      Delete

\*Short Name: Admission Applications      ☒ Default

Self-Service: Admission Applications      ☐ Solvable

Long Description: Admissions - Admission Ap      ☒ Open in New Window

\*Status: Active      ☐ Self-Service

Usage      ☐ SetID Enabled

**Transfer Details**

☒ Portal CREF      [Link Test](#)

Portal Name: EMPLOYEE      Content: HC\_ADM\_APPL\_MAINTNC

Page Name:      Action: Update/Display

☐ PeopleCode

Class ID:      Package Tree Viewer

Class Path:      Method Name:

**Search Keys**

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

### Image: Link Definition page (2 of 2)

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

**Drilldown Details**

\*Navigation:      Market:

**Related Object Status Details**

☒ PeopleCode

Class ID:      Package Tree Viewer

Class Path:      Method Name:

☐ Static Value

Static Status:

Modify System Data

This object is maintained by PeopleSoft.

Created: 04/01/2008 2:32PM PDT By: QA

Modified: 04/01/2008 2:32PM PDT By: QA

## Link Details

### Link Name

Enter a name for this link.

### Short Name

Enter a short name for this link definition. The text you enter in this field appears on the Link Group page in the drop-down list box for the Link Category field.

### Self-Service

The text you enter in this field appears on the self-service application page.

<b>Long Description</b>	Enter a long description. Use this field to describe a particular link definition in more detail.
<b>Status</b>	<p>Select either <i>Active</i> or <i>Inactive</i>.</p> <p>The system includes only the active link definitions in the Link Category drop-down list box on the Case page.</p>
<b>Default</b>	<p>Select this check box if you want the link to become the default for the category when it appears on the Case page.</p> <hr/> <p><b>Note:</b> Because users may not have access to all links, you can set multiple defaults.</p> <hr/>
<b>Solvable</b>	<p>Select this check box if you want the agent to close a case by performing an action.</p> <p>Closing a case by performing an action is a manual process. If the agent performs an action that resolves the case, then the agent must change the case status to <i>Closed</i> and save the Case page.</p> <hr/> <p><b>Note:</b> All actions are delivered as non-solvable when you first install the application.</p> <hr/>
<b>Open in New Window</b>	<p>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.</p> <hr/> <p><b>Note:</b> This option is applicable for those link definitions that are Portal CREFs.</p> <hr/>
<b>Self-Service</b>	Select this check box to have this action available on the Manage Case page in your self-service applications.
<b>SetID Enabled</b>	<p>Select this check box to make the setID column visible in the Search Keys grid on the Link Definition page. This setting forces you to enter a setID value in the field.</p> <p>At runtime, the system compares the setID derived from the case business unit with the setID of the link definition. If the setIDs don't match, then the system does not display the link definition in the Related Actions drop-down list box.</p> <p>This setting is done to avoid displaying a message to the user that the selected actions cannot be performed because the setIDs don't match.</p>
<b>Usage</b>	Displays the usage count. The value in this field increments each time the system adds the link to the Related Action Summary sections with the Case component. To find out which links are used most often, you can write reports using this field.



## Transfer Details

<b>Portal CREF</b>	Select this option to create a portal content reference.
<b>Portal Name</b>	Select the object name that you want to associate with the link.
<b>Content</b>	The actual content reference.
<b>Action</b>	Select the page mode that appears when the page is accessed. Values are <i>Add</i> , <i>Correction</i> , <i>Update/Display</i> or <i>Update/Display All</i> .
<b>PeopleCode</b>	Select this option if the PeopleCode method needs to be invoked when the action is performed.
<b>Class ID</b>	Specify the name of the application class.
<b>Class Path</b>	Specify the class path of the application package.
<b>Method Name</b>	Specify the method name.
<b>Field Name</b>	<p>This field identifies the search keys that the system uses to access the linked component. Search keys can be mentioned by associating terms that are used in AAF policies. These terms are resolved when an action is performed from the Case page.</p> <p>For example, EMPLID (employee ID) is the search key used for most PeopleSoft HCM transactions and is associated as Term to the link definition. Term can also be configurable. Users can click the Lookup button to provide the value for the configurable term. For example, see the Defect Workflow Link Definition in the Related Actions Link category.</p> <hr/> <p><b>Note:</b> To bypass the Send Case Survey page when an agent selects the <i>Case Survey</i> link, modify the system data and use the Search Keys group box to select the last three terms that appear under Call Center, Link Definition after you select the Add Term button. These terms include: <i>Select a Dialog Business Unit</i> &lt;BUSINESS_UNIT&gt;, <i>Select a Dialog ID</i> &lt;DIALOG_ID&gt;, and <i>Select an External Event Trigger</i> &lt;EXT_EVENT_TRIGGER&gt;.</p> <hr/>
<b>Term Name</b>	<p>This value is not editable if the selected term is not configurable. If the selected term is configurable, then this field appears as a link.</p> <p>See "Understanding AAF (<i>PeopleSoft CRM 9.2: Automation and Configuration Tools</i>)".</p>

## DrillDown Details

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

<b>Navigation</b>	Select the transaction ID of the page to which you want the system to navigate.
<b>Market</b>	Select the object name that you want to associate with the link.

## Related Object Status Details

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

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

## Link Group Page

Use the Link Group page (RC\_LINK\_GROUP) to view and modify the link groups into which link categories are organized.

## Navigation

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

### Image: Link Group page

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

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

## Link Selection - Links

### Description

Enter a description of the link group that you want to create.

### Link Category

Select a link category that contains the desired link definition that you want in this link group. Only active link categories are available for selection.

### Version

Select a version. A category can have multiple versions, each associated with a different target system (for example, PeopleSoft HCM 8.9, PeopleSoft HCM 8.8, and so on).

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**Note:** Active versions appear in this drop-down list box for selection. However, Oracle recommends that only one version of each link category is activated at any time.

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### Link Name

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

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

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## Link Selection - System Data

### System Data

If the link group was delivered by the PeopleSoft system, the system displays a button that you can click to revise the link associated with the button. The system displays the message: *This object was delivered by PeopleSoft but updated by the customer.* It also enters the date it was modified. You can then click the Links tab and make changes to the link category.

### Message Description

Displays a message indicating who modified or is maintaining the link group.

### Date Modified

Displays the date the link group was modified.

### Modified By

Displays the name of the person who modified the link group.

## Related Links

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

# Setting Up PeopleSoft Change Management

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## Understanding PeopleSoft Change Management Setup

This section discusses:

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

### Change Management Usages

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

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

See [Understanding Change Request Management](#).

### Change Request Prompt Tables

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

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

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

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

## Phase Templates

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

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

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

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

## Transitions and Active Analytics Framework

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

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

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Task Type Role Map and the Assignment Engine

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

## Security Considerations for Accessing Change Management Tasks

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

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

See "Application Security (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

See "Defining Application Security (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

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## Setting Up Prompt Tables for Change Requests

To set up prompt tables for change requests, use the Sub Type (RG\_UD\_REQ\_SUB\_TYPE), Status (RG\_UD\_REQ\_STATUS), Request Type (RG\_UD\_REQ\_TYPE), Resolution (RG\_UD\_REQ\_RESO), Priority (RG\_UD\_REQ\_PRTY), Phase (RG\_UD\_REQ\_STATE), Impact (RG\_UD\_REQ\_IMPACT), Category (RG\_UD\_REQ\_CATGY), Business Reason (RG\_UD\_REQ\_BUSR), Component Audit (RG\_UD\_COMP\_AUDIT), Note Type (RG\_UD\_REQ\_NOTT), Relationship Type (RG\_UD\_REL\_TYPE), Status Transition (RG\_UD\_PHS\_TRANS) components.

This section discusses how to:

- Set up change request business reasons.
- Set up change request categories.
- Set up the change request component audit page.
- Set up change request impact values.
- Set up change request note types.
- Set up change request phases.
- Set up change request priorities.
- Set up change request relationship types.
- Set up change request resolutions.

- Set up change request types.
- Set up change request statuses.
- Set up change request status transitions.
- Set up change request subtypes.

## Pages Used to Set Up Prompt Tables for Change Requests

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Business Reason	RG_UD_REQ_BUSR	Set Up CRM, Product Related, Change Management, Business Reason, Business Reason	Set up change request business reasons.
Category	RG_UD_REQ_CATGY	Set Up CRM, Product Related, Change Management, Category, Category	Set up change request categories.
Component Audit	RG_UD_REQ_AUDIT	Set Up CRM, Product Related, Change Management, Component Audit, Component Audit	Select the record or table name for which you want the system to generate and maintain audit records.
Impact	RG_UD_REQ_IMPACT	Set Up CRM, Product Related, Change Management, Impact, Impact	Set up change request impact values.
Note Type	RG_UD_REQ_NOTT	Set Up CRM, Product Related, Change Management, Note Type, Note Type	Set up note types.
Phase	RG_UD_REQ_STATE	Set Up CRM, Product Related, Change Management, Phase, Phase	Set up change request phases.
Priority	RG_UD_REQ_PRTY	Set Up CRM, Product Related, Change Management, Priority, Priority	Set up change request priorities.
Relationship Type	RG_UD_REL_TYPE	Set Up CRM, Product Related, Change Management, Relationship Type, Relationship Types	Set up descriptions of relationships that you want to appear on the Relate Existing Change Request page for change management cases that have a correlation in some way.
Resolution	RG_UD_REQ_RESO	Set Up CRM, Product Related, Change Management, Resolution, Resolution	Set up change request resolutions.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Request Type	RG_UD_REQ_TYPE	Set Up CRM, Product Related, Change Management, Request Type, Request 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.
Status Transition	RG_UD_PHS_TRANS	Set Up CRM, Product Related, Change Management, Status Transition, Status Transition	Set up notifications when a change in status occurs.
Sub Type	RG_UD_REQ_SUB_TYPE	Set Up CRM, Product Related, Change Management, Sub Type, Sub Type	Set up change request subtypes.

## Business Reason Page

Use the Business Reason page (RG\_UD\_REQ\_BUSR) to set up change request business reasons.

### Navigation

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

### Image: Business Reason page

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

**Business Reason**

SetID SHARE

*Reason	*Description
BUSR	Business Requirement
FACL	Facility Related
INTR	CI Intro/Upgrade/Renewal
PROB	Problem/Incident Resolution

Add new Business Reason

\* Required Field

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

## Category Page

Use the Category page (RG\_UD\_REQ\_CATGY) to set up change request categories.

## Navigation

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

### Image: Category page

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

**Category**

SetID SHARE

*Category	*Description			
MAJR	Major			
MINR	Minor			
SIGN	Significant			

Add new Category

\* Required Field

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

## Component Audit Page

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

## Navigation

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

### Image: Component Audit page

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

**Component Audit**

\*Component Name  \*Audit Record Name

Description

Record (Table) Name	Add	Change	Delete	
<input type="text" value="RG_CHANGE_ATCH"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_INTR"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_NOTE"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_PROD"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_RCHG"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_REQST"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_ROBJ"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
<input type="text" value="RG_CHANGE_STATE"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

☐ Show Field Label

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

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

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

---

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

---

## Impact Page

Use the Impact page (RG\_UD\_REQ\_IMPACT) to set up change request impact values.

## Navigation

Set Up CRM, Product Related, Change Management, Impact, Impact

### Image: Impact page

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

**Impact**

SetID SHARE

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

Add new Impact

\* Required Field

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

## Note Type Page

Use the Note Type page (RG\_UD\_REQ\_NOTT) to set up note types.

## Navigation

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

### Image: Note Type page

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

**Note Type**

SetID SHARE

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

[Add New Note Type](#)

\* Required Field

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

## Phase Page

Use the Phase page (RG\_UD\_REQ\_STATE) to set up change request phases.

## Navigation

Set Up CRM, Product Related, Change Management, Phase, Phase

### Image: Phase page

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

**Phase**

SetID SHARE

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

[Add New Phase](#)

\* Required Field

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

## Priority Page

Use the Priority page (RG\_UD\_REQ\_PRTY) to set up change request priorities.

## Navigation

Set Up CRM, Product Related, Change Management, Priority, Priority

### Image: Priority page

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

**Priority**

SetID SHARE

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

[Add New Priority](#)

\* Required Field

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

## Relationship Types Page

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

## Navigation

Set Up CRM, Product Related, Change Management, Relationship Type, Relationship Types

### Image: Relationship Types page

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

**Relationship Types**

SetID CRM01

Relationship Types Find | View All First 1 of 3 Last

\*Relationship Type  Short Description

Long Description

Parent Label  Child Label

Equivalent Label  ☒ Hierarchical

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

\* Required Field

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

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

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

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

## Resolution Page

Use the Resolution page (RG\_UD\_REQ\_RESO) to set up change request resolutions.



## Navigation

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

### Image: Resolution page

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

**Resolution**

SetID CRM01

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

Add New Resolution

\* Required Field

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

## Request Type Page

Use the Request Type page (RG\_UD\_REQ\_TYPE) to set up change request types.

## Navigation

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

### Image: Request Type page

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

**Request Type**

SetID SHARE

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

Add New Request Type

\* Required Field

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

## Status Page

Use the Status page (RG\_UD\_REQ\_STATUS) to set up change request statuses.

## Navigation

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

### Image: Status page

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

**Status**

SetID SHARE

*Status	*Category	*Description	Cascade		
APPR	Open	Approved	<input type="checkbox"/>		
BOUT	Open	Backed Out	<input type="checkbox"/>		
CLOS	Closed	Closed	<input checked="" type="checkbox"/>		
COMP	Closed	Completed	<input type="checkbox"/>		
EXEC	Open	Executing	<input type="checkbox"/>		
HOLD	On-Hold	On Hold	<input type="checkbox"/>		
NEW	Open	New	<input type="checkbox"/>		
REJ	Canceled	Rejected	<input type="checkbox"/>		
REVV	Open	In Review	<input type="checkbox"/>		

[Add New Status](#)

\* Required Field

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

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

## Status Transition Page

Use the Status Transition page (RG\_UD\_PHS\_TRANS) to set up notifications when a change in status occurs.

## Navigation

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

### Image: Status Transition page

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

**Status Transition**

SetID SHARE

*Status From	*Status To	Transition Condition	Edit Condition	Clear Condition		
Approved	Executing		<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
Approved	On Hold		<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
Completed	Backed Out		<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
Completed	Closed		<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
Executing	Completed	All Tasks Completed For Change Request Status is true	<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
Executing	On Hold	Change Request Priority equals Low And Number Incomplete Tasks For Change Request Status is at least 1	<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
On Hold	Approved		<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		
On Hold	Executing		<a href="#">Edit Condition</a>	<a href="#">Clear Condition</a>		

[Add New Status Transition](#)

\* Required Field

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

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

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

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

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

## Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Sub Type Page

Use the Sub Type page (RG\_UD\_REQ\_SUB\_TYPE) to set up change request subtypes.

### Navigation

Set Up CRM, Product Related, Change Management, Sub Type, Sub Type

### Image: Sub Type page

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

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

Add New Sub Type

\* Required Field

### Request Type

Select a request type.

### Sub Type

Enter a subtype.

### Description

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

## Setting Up Change Management Business Units

To set up Change Management business units, use the Change Management Definition (RG\_BUSINESS\_UNIT) component.

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

## Page Used to Set Up Change Management Business Units

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

### Define Change Management Page

Use the Define Change Management page (BUS\_UNIT\_TBL\_RG) to define business rules for a call center business unit.

#### Navigation

Set Up CRM, Business Unit Related, Change Management, Change Management Definition

#### Image: Define Change Management page

This example illustrates the fields and controls on the 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 will appear on the Case page and other places where the business unit appears.

#### Call Center Business Unit

Select the default call center business unit to use when selecting a case to relate to a change request.

#### Quality Business Unit

Select the default PeopleSoft Quality Management business unit to use when selecting a case to relate to a change request.

#### Phase Template Duration

Select either *Phase Level* or *Task Level*. Both phases and tasks can have durations. Your selection in this field tells the phase template load process whether to use the phase durations or task durations when loading phases and tasks for a change request.

This functionality provides a way to define templates to have the flexibility for either phase or task duration calculations.

If you do not select a template duration, the system defaults the value in this field to *Phase Level*.

---

**Note:** If you define duration at the task level, the system enters both a start date and an end date using that task duration calculated for the change request. This provides flexibility to define templates that have both parallel and dependant (sequential) tasks on a change request when doing a template load. You can still, however, manually add phases and tasks where tasks can be parallel or dependent.

---

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## Setting Up Change Management Defaults

This section discusses how to set up Change Management defaults.

### Page Used to Set Up Change Management Defaults

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Defaults	BUS_UNIT_RG_DEF	Set Up CRM, Business Unit Related, Change Management Definition, Defaults	Set up Change Management defaults.

### Defaults Page

Use the Defaults page (BUS\_UNIT\_RG\_DEF) to set up Change Management defaults.

## Navigation

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

### Image: Defaults page

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

Business Unit		
Business Unit	US200	

Business Unit Defaults		
Request Type	HARD	Hardware
Sub Type		
Status		
Business Reason	BUSR	Business Requirement
Priority	HIGH	High
Category	SIGN	Significant
Impact	SIGN	Significant
Template ID	MODEL2A	Software Normal Installation

<b>Request Type</b>	Select the default request type for a new change request.
<b>Sub Type</b>	Select the default subtype for a new change request.
<b>Status</b>	Select the default status for a new change request.
<b>Business Reason</b>	Select the default business reason for a new change request
<b>Priority</b>	Select the default priority for a new change request.
<b>Category</b>	Select the default category for a new change request.
<b>Impact</b>	Select the default case type for a new change request.
<b>Template ID</b>	Select the default template ID for a new change request.

## Setting Up Template Duration Levels

This section discusses how to set up template duration levels.



## Page Used to Set Up Template Duration Levels

Page Name	Definition Name	Navigation	Usage
Template Duration Level	BUS_UNIT_DURLVL_RG	Set Up CRM, Business Unit Related, Change Management Definition, Template Duration Level	Instruct the system on which tasks or phases to display on the Change Request page.

## Template Duration Level Page

Use the Template Duration Level page (BUS\_UNIT\_DURLVL\_RG) to instruct the system on which tasks or phases to display on the Change Request page.

### Navigation

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

### Image: Template Duration Level page

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

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

View Phases All

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

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

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

## Setting Up Phase Templates

To set up phase templates, use the Phase Template Use (RG\_UD\_PHS\_MODEL) and Phase Template (RG\_UD\_MODEL) components.

This section discusses how to:

- Create phase templates.
- Define task group templates.
- Define phase templates.
- Set up phase template use.

### Pages Used to Create a Phase Template

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Phase	RG_UD_REQ_STATE	Set Up CRM, Product Related, Change Management, Phase	Create phases. These 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.
Phase Template	RG_UD_PHS_MODEL	Set Up CRM, Product Related, Change Management, Phase Template, Phase Template	Create the phase template. Identify the phases and the phases' task group templates that you want to associate with the phase template.
Phase Template Use	RG_UD_PHS_MODL_USE	Set Up CRM, Product Related, Change Management, Phase Template Use, Phase Template Use	Instruct the system on which phase templates to display when entering a change request for a specific business unit.

### Phase Page

Use the Phase page (RG\_UD\_REQ\_STATE) to create phases.

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

## Navigation

Set Up CRM, Product Related, Change Management, Phase

### Image: Phase page

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

**Phase**

SetID SHARE

*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

\* Required Field

## Phase

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

### Add New Phase

Click to add a new phase to this setID.



Click the Datetime Added icon to view when the phase was last added or modified by a user.

## Task Group Template Page

Use the Task Group Template page (RB\_TSK\_GRP\_TPL) to define task group templates.

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

## Navigation

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

### Image: Task Group Template page

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

**Task Group Template**

**Task Group**

Task Group Template: REVIEW    ☒ Active    Clone

Application Usage: Change Management

\*Description: Review Change

**Task Types**    Customize | Find | First 1-3 of 3 Last

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

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

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

### Start Use Code

Select from these values:

*Current Phase Start:* Task start date is equal to the current phase start date.

*Next in Sequence:* Task start date is equal to the prior task's end date.

*Prior Phase Start:* Task start date is equal to the previous phase start date.

*Prior Task Start:* Task start date is equal to the prior task start date.

## Phase Template Page

Use the Phase Template page (RG\_UD\_PHS\_MODEL) to create the phase template.

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

## Navigation

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

### Image: Phase Template page

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

**Phase Template**

SetID ITHD1

\*Template ID MODEL1 \*Description E-mail Server Replacement

\*Long Description E-mail Server Replacement

**Phases**

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

**Phase** Find | View All First 1 of 6 Last

\*Phase Assessment \*Status New

Days 2 Hours Last Modified 04/30/2004 3:30PM JDILLON

**Template Phase Tasks** Find | View All 1 of 1 First Last

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

#### Template ID

Enter an abbreviation for the phase template that you are creating.

#### Description and Long Description

Enter text to describe the phase template that you are adding to the system.

#### Phase

Select a phase to associate with this phase template. To set up phases, select Set Up CRM, Product Related, Change Management, Phase.

#### Status

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

#### Days and Hours

Enter the number of days and hours that the phase should take.

#### Task Group Template ID

Select the task group template that you want to associate with this particular phase of the template.

## Phase Template Use Page

Use the Phase Template Use page (RG\_UD\_PHS\_MODL\_USE) to instruct the system on which phase templates to display when entering a change request for a specific business unit.

## Navigation

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

### Image: Phase Template Use page

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

**Phase Template Use**

SetID ITHD1

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

Add New Phase Template Use

\* Required Field

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

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

### Template Use ID

Enter the name of the template that you set up on the Task Group Template page (select Set Up CRM, Common Definitions, Task Management, Task Group Template).

### Start Date and End Date

Use the start and end dates to activate or inactivate a given phase template use row.

For example, if you wanted to create another row that loaded a different template ID based on the same type, sub type, and priority, you could give the MODEL3A row an end date and then insert a new row with the same type, sub type, and priority but with a new template ID.

### Request Type

Select the type of change request that you want the system to look for on the Change Request page.

### Sub Type

Select the subtype that you want the system to look for on the Change Request page.

### Priority

Select the priority that you want the system to look for on the Change Request page.

### Template ID

Select the template ID that you want the system to use on the change request.

## Setting Up the Task Type Role Map

To set up the Task Type Role map, use the Task Type Role Map (RG\_UD\_TSK\_ROLE\_GBL) component.

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

## Page Used to Set Up the Task Type Role Map

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Navigation</i></b>	<b><i>Usage</i></b>
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.

## Task Type Role Map Page

Use the Task Type Role Map page (RG\_UD\_TSK\_ROLE) to create one-to-one mapping between task types and roles in Change Management.

## Navigation











## Set Up CRM, Product Related, Change Management, Task Type Role Map

**Image: Task Type Role Map page**

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

## Task Type Role Map

SetID ITHD1

Task Type Role Map				
<a href="#">Customize</a>   <a href="#">Find</a>         <a href="#">First</a>   <a href="#">1-4 of 4</a>   <a href="#">Last</a>				
*Task Type	*Role	Assign All Members of Group	Datetime Added	
<div>Change Activity</div>	<div>Change Owner</div>	<input checked="" type="checkbox"/>		
<div>Appointment</div>	<div>Change Administrator</div>	<input checked="" type="checkbox"/>		
<div>Appointment</div>	<div>Change Tester</div>	<input type="checkbox"/>		
<div>Meeting</div>	<div>Change Approval Board</div>	<input checked="" type="checkbox"/>		

[Add New Task Type Role Map](#)

\* Required Field

## Task Type Role Map

**Task Type** Select a task type.

Task types are set up in Task Management under Set Up CRM, Common Definitions, Task Management, Task Type. They enable users to categorize tasks.

**Role**

Select a management role.

Roles, which are implemented using PeopleTools security, provide the assignment engine with the ability to select and assign all or one member of a provider group that has its role mapped to a task type for tasks that are associated with a change request.

---

**Note:** Only security roles are listed: role queries are not permitted here.

---

**Assign All Members of Group**

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

**Add New Task Type Role Map**

Click this button to add a new row to the Task Type Role Map section.



# Setting Up PeopleSoft Quality Management

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## Understanding PeopleSoft Quality Management Business Units

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

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## Defining PeopleSoft Quality Management Business Units

To define PeopleSoft Quality Management business units, use the Quality Definition (RQ\_BUS\_UNIT\_TBL) component.

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

## Page Used to Define PeopleSoft Quality Management Business Units

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Quality Definition	RQ_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Quality Definition	Define PeopleSoft Quality Management business units.

## Quality Definition Page

Use the Quality Definition page (RQ\_BUS\_UNIT\_TBL) to define PeopleSoft Quality Management business units.

## Navigation

Set Up CRM, Business Unit Related, Quality Definition

### Image: Quality Definition page

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

#### Business Unit

Displays the business unit abbreviation that you selected or entered before you accessed this page.

#### Default SetID

Select the default setID that you want to associate with the business unit.

---

**Note:** The system displays this field only when you define a new business unit that has not already been defined elsewhere within the PeopleSoft CRM system.

---

#### Currency Code

Select the default monetary unit in which you conduct transactions in this business unit.

#### Call Center Business Unit

Select the call center business unit that you want to associate with this PeopleSoft Quality Management business unit.

#### Change Business Unit

Select the change management business unit that you want to associate with this PeopleSoft Quality Management business unit.

#### Create Business Unit

Click to save and create the new business unit. Clicking this button is the same as clicking the Save button.

---

**Note:** The system displays this button only when you define a new business unit that has not already been defined elsewhere within the PeopleSoft CRM system.

---

## Setting Up User Codes

To set up user codes, use the Defect Relationship Types (RQ\_RELATION\_TYPE), Defect Causes (RQ\_UD\_DEF\_SUSPEC), Defect Symptoms (RQ\_UD\_DEF\_SYMPTM), Defect Status State (RQ\_UD\_ST\_REASON), Defect Status State Reason (RQ\_UD\_ST\_ST\_RSN), Defect Status (RQ\_UD\_ST\_STATUS), and Status Combinations (RQ\_UD\_STAT\_COMBO) components.

This section discusses how to:

- Define defect symptom codes.
- Define defect cause codes.
- Define defect status codes.
- Define status states.
- Define status-state reasons.
- Define valid status-state combinations.
- Define defect relationship types.

## Pages Used to Set Up User Codes

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Defect Symptoms	RQ_UD_DEF_SYMPTM	Set Up CRM, Product Related, Quality Management, Defect Symptoms, Defect Symptoms	Define defect symptom codes to provide consistent problem symptom descriptions and to facilitate data entry.
Defect Causes	RQ_UD_DEF_SUSPEC	Set Up CRM, Product Related, Quality Management, Defect Causes, Defect Causes	Define defect cause codes to provide consistent potential problem cause descriptions and to facilitate data entry.
Defect Status	RQ_UD_ST_STATUS	Set Up CRM, Product Related, Quality Management, Defect Status, Defect Status	Define defect status codes.
Defect Status State	RQ_UD_ST_REASON	Set Up CRM, Product Related, Quality Management, Defect Status State, Defect Status State	Define status states to describe defect status more specifically.
Defect Status State Reason	RQ_UD_ST_ST_RSN	Set Up CRM, Product Related, Quality Management, Defect Status State Reason, Defect Status State Reason	Define status-state reason codes to explain why a defect is in a particular status state.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Status Combinations	RQ_UD_STAT_COMBO	Set Up CRM, Product Related, Quality Management, Status Combinations, Status Combinations	Define status-state combinations to control permissible transitions.
Defect Relationship Types	RQ_RELATION_TYPE	Set Up CRM, Product Related, Quality Management, Defect Relationship Types, Defect Relationship Types	Define defect relationship types to describe dependencies and relationships among defects.

## Defect Symptoms Page

Use the Defect Symptoms page (RQ\_UD\_DEF\_SYMPTM) to define defect symptom codes to provide consistent problem symptom descriptions and to facilitate data entry.

### Navigation

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

### Image: Defect Symptoms page

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

**Defect Symptoms**

SetID SHARE

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

\* Required Field

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

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

**Symptom and Description**

Enter a unique code and description that represent the defect symptom.

**Defect Causes Page**

Use the Defect Causes page (RQ\_UD\_DEF\_SUSPEC) to define defect cause codes to provide consistent potential problem cause descriptions and to facilitate data entry.

**Navigation**

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

**Image: Defect Causes page**

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

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

\* Required Field

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

**Suspected Cause and Description**

Enter a unique code and description that represent the suspected cause of the defect.

**Defect Status Page**

Use the Defect Status page (RQ\_UD\_ST\_STATUS) to define defect status codes.

## Navigation

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

### Image: Defect Status page

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

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

\* Required Field

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

#### Status Code and Description

Enter a unique four-character code and description that represent the defect status.

## Defect Status State Page

Use the Defect Status State page (RQ\_UD\_ST\_REASON) to define status states to describe defect status more specifically.

## Navigation

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

### Image: Defect Status State page

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

**Defect Status State**

SetID SHARE

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

\* Required Field

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

#### Status Code

Select the description of the defect's status in the resolution process. Delivered status options are: *Closed* and *Open*. Define status codes on the Defect Status page.

#### State and Description

Enter a unique code of up to four characters and a description to represent the status state.

## Defect Status State Reason Page

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

## Navigation

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

### Image: Defect Status State Reason page

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

**Defect Status State Reason**

SetID SHARE

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

\* Required Field

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

### Status

Select the description of the defect's status in the resolution process. Delivered status options are: *Closed* and *Open*. Define status codes on the Defect Status page.

### State

Select the state that you want to associate with the defect status. States define the defect's status in the resolution process more specifically than status codes. Select either *Deferred*, *Do Not Fix*, *Fixed*, or *Withdrawn*.

### Reason and Description

Enter a code of up to three characters and a description to further explain the reason for the status-state combination.



## Status Combinations Page

Use the Status Combinations page (RQ\_UD\_STAT\_COMBO) to define status-state combinations to control permissible transitions.

### Navigation

Set Up CRM, Product Related, Quality Management, Status Combinations, Status Combinations

### Image: Status Combinations page

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

*Status Code From	*State Code From	*Status Code To	*State Code To
Open	To Defer	Closed	Deferred
Open	To Defer	Closed	Do Not Fix
Open	To Fix	Closed	Do Not Fix
Open	To Fix	Closed	Withdrawn
Open	To Test	Closed	Fixed
Open	To Test	Closed	Do Not Fix
Open	To Test	Closed	Withdrawn
Open	Unassigned	Closed	Do Not Fix
Open	Unassigned	Closed	Withdrawn
Open	To Fix	Open	To Defer
Open	To Fix	Open	To Test
Open	To Fix	Open	Unassigned
Open	To Test	Open	To Defer
Open	To Test	Open	To Fix
Open	To Test	Open	Unassigned

\* Required Field

As a defect or enhancement request moves through the resolution process, you want to change the status-state combination to reflect its progress. However, certain changes do not make sense. For example, if an enhancement request's status is *Open - Deferred*, you should not change it to *Closed - Fixed* without passing through the verify, fix, and test stages.

Use this page to control which transitions are permissible. Define combinations for all possible transitions, including reverse transitions. For example, if a software fix fails in testing, it must be returned to the developer. In this case, you need a valid status combination that allows the change to go from *Open - Fixed* back to *Open - To Test* in development.

### Status Code From

Select the description of the beginning status code from the codes that you defined on the Defect Status page.

<b>State Code From</b>	Select the description of the beginning state code from the codes that you defined on the Defect Status State page.
<b>Status Code To</b>	Select the description of the new (after the combination change) status code from the codes that you defined on the Defect Status page.
<b>State Code To</b>	Select the description of the new state code after the change from the codes that you defined on the Defect Status State page.

## Defect Relationship Types Page

Use the Defect Relationship Types page (RQ\_RELATION\_TYPE) to define defect relationship types to describe dependencies and relationships among defects.

### Navigation

Set Up CRM, Product Related, Quality Management, Defect Relationship Types, Defect Relationship Types

### Image: Defect Relationship Types page

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

**Defect Relationship Types**

SetID ITHD1

Defect Relationship Types Find View All First 1 of 3 Last

\*Relationship Type COMN Short Description Common

Long Description Common

Parent Label Parent Child Label Child

Equivalent Label ☐ Hierarchical

Date Created 03/22/2004 10:17PM PDT Dillon,Joe

Last Modified 03/22/2004 10:17PM PDT Dillon,Joe

\* Required Field

Sometimes, two or more defect cases are related to one another, or the solution to a defect may be dependent on the solution to a previous defect. Defect relationship types describe these dependencies. All defect relationships fall into the general categories of hierarchical or equivalent.

An *equivalent relationship* is two or more defects having the same cause. One fix resolves multiple cases. A *hierarchical relationship* is an instance when one case cannot be resolved without first resolving another.

<b>Relationship Type</b>	Enter a unique code up to five characters to represent the relationship type.
--------------------------	---

**Parent Label and Child Label**

If you are defining a hierarchical relationship, enter a label value for both the parent and the child defects. These labels are used on the Related Defects page to describe the relationship.

**Equivalent Label**

If you are defining an equivalent relationship, enter a label value to appear on all related cases.

**Hierarchical**

Clear this check box to define an equivalent relationship type.

---

## Setting Up Products

To set up products, use the Component Definitions (RQ\_COMP\_DEFN), Component Versions (RQ\_PROD\_VERS), and Component Types (RQ\_UD\_COMP\_TYPE) components.

This section provides an overview of products and components and discusses how to:

- Define component types.
- Define product components.
- Define component relationships.
- Define component versions.
- Define version environments.

## Pages Used to Set Up Products

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Component Types	RQ_UD_COMP_TYPE	Set Up CRM, Product Related, Quality Management, Component Types, Component Types	Define general component types.
Component Definition	RQ_COMP_DEFN	Set Up CRM, Product Related, Quality Management, Component Definitions, Component Definition	Define product components.
Component Definitions - Relationships	RQ_COMP_PAR_LNK	Set Up CRM, Product Related, Quality Management, Component Definitions, Relationships	Define parent-child relationships between product components.
Version	RQ_PROD_VERS	Set Up CRM, Product Related, Quality Management, Component Versions, Version	Define distinct component versions.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Environments	RQ_PROD_VERS_ENV	Set Up CRM, Product Related, Quality Management, Component Versions, Environments	Define version environment details.

## Understanding Products and Components

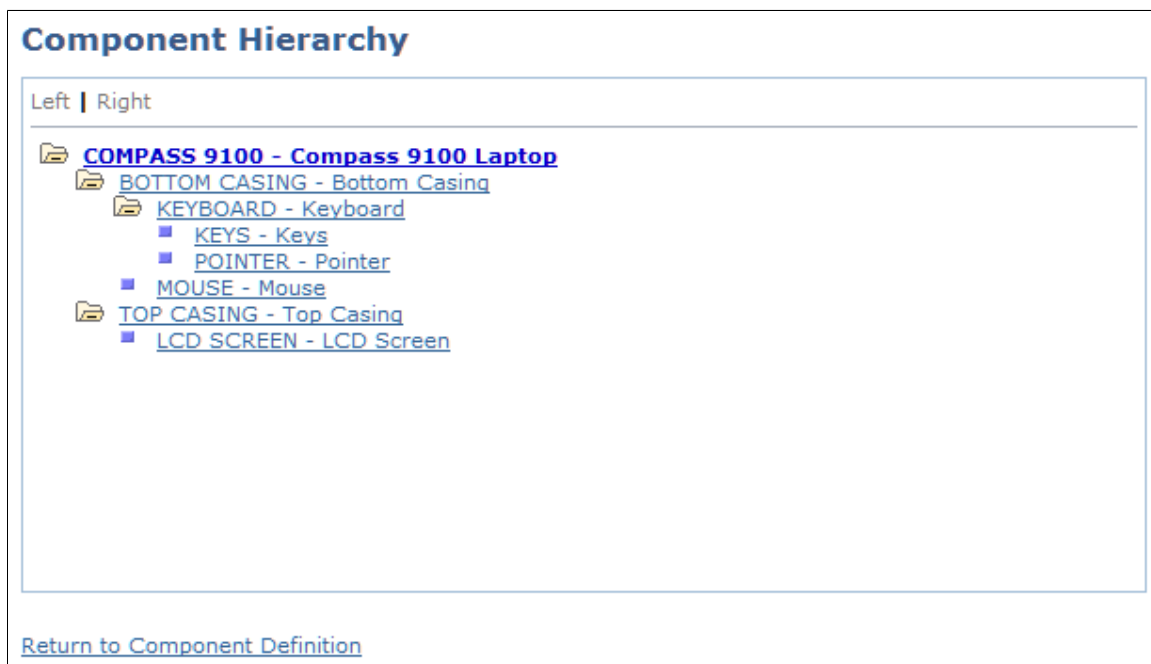
Generally, every product consists of components, each of which may also consist of subcomponents. You use the Component Type page to break down products into component and subcomponent levels.

You can then combine components and subcomponents in a hierarchical relationship on the Component Definitions page. As changes are made in the combination of components and subcomponents, a different component definition of the product is created and distinguished from all others by a unique version definition. When you select a specific product version while creating a defect record, you can drill down to the correct components and subcomponents that you used to build that particular version.

For example, here is a simple breakdown of a laptop computer's components:

### Image: Example of laptop component hierarchy

This example illustrates the fields and controls on the Example of laptop component hierarchy.



At the least, a laptop computer is made up of a bottom casing and a top casing. One of the bottom casing's subcomponents is the keyboard, which is made up of several individual keys. The top casing has a liquid crystal display (LCD) screen as one of the subcomponents. As you can see, this breakdown could go on for many levels.

Suppose that you manufacture laptops, and you want to offer an improved LCD screen. The laptops that include the improved screen are a new version. As you create the version's component definition, the only change is the LCD screen, but that change means that the hierarchy of components is different. By

attaching the new component definition to a new and unique component version, you are assured that the correct LCD screen is available as you drill down on the product components.

**Note:** Product definitions can become quite complex. Consult with product experts to obtain the information needed to complete the following pages.

## Component Types Page

Use the Component Types page (RQ\_UD\_COMP\_TYPE) to define general component types.

### Navigation

Set Up CRM, Product Related, Quality Management, Component Types, Component Types

### Image: Component Types page

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

*Component Type	*Type Description	*Production Description		
BMCS	Bottom Casing	Laptop		
CARI	Carriage	Printer Carriage		
KEYS	Keys	Laptop		
KYBD	Keyboard	Laptop		
LCDS	LCD Screen	Laptop		
LPTP	Laptop	Laptop		
MOUS	Mouse	Mouse		
TPCS	Top Casing	Laptop		
TWR4	Tower 4	Tower Four		

\* Required Field

The component type is the most basic definition of a component. This general description can be used in multiple component definitions. For example, you might define a component type that represents all keyboards, or you might narrow the definition to only keyboards for laptops.

### Component Type

Enter a unique code that represents the component specifically defined by the combination of the type and production descriptions. This field is limited to four characters.

### Type Description

Briefly describe the component. This description appears in the component hierarchy display and on the main Defect page.

You can also use it to describe the same component in multiple component definitions.

For example, all laptop computers have a keyboard. The keyboards for each laptop model may differ, but they all have

a keyboard of some type. The type description *keyboard* is a general description of the component that is used for all models.

### Production Description

Briefly describe the product to which the component belongs.

This field is informational and provides a means of further distinguishing a type description by associating it with a particular product or by adding further defining characteristics.

For example, you can distinguish between a laptop keyboard and a desktop keyboard by changing the production description.

## Component Definition Page

Use the Component Definition page (RQ\_COMP\_DEFN) to define product components.

### Navigation

Set Up CRM, Product Related, Quality Management, Component Definitions, Component Definition

### Image: Component Definition page

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

The screenshot shows the 'Component Definition' page with the 'Main Information' tab selected. At the top, there are two tabs: 'Component Definition' and 'Relationships'. Below the tabs, a header bar displays 'Component ID KEYBOARD' and 'SetID ITHD1'. The main section is titled 'Main Information' and contains several fields: 'Name' with the value 'Keyboard', '\*Type' with a dropdown menu showing 'Keyboard', and 'Class' with a dropdown menu showing 'HW'. There is a 'Details' section with a large text area and a 'Component Hierarchy' link. At the bottom, it shows 'Date Created 09/23/2002 3:25PM PDT' and 'Last Modified 09/23/2002 3:25PM PDT'.

The component definition is a more specific description of a particular component. For example, you might have a laptop keyboard with gray keys and another with black keys. The component definition enables you to distinguish between the two keyboards.

The component definitions also show the level at which subcomponents are linked to other components in a child-to-parent relationship, creating a hierarchy that culminates in the product component definition.

### Name

Enter the component name. This name is informational only and can be the same as the component ID or type description.

### Component Hierarchy

Click this link to view the hierarchy of components.

### Type

Select the type of component that you described in the Name field.

### Class

Select a component class description. Values are: *Doc* (documentation), *HW* (hardware), *Service*, *Test*, *Third Party*

*Doc* (third-party documentation), *Third Party HW* (third-party hardware), *Third Party SW* (third-party software), and *Third Party Service*.

Component Definitions - Relationships Page

Use the Component Definitions - Relationships page (RQ\_COMP\_PAR\_LNK) to define parent-child relationships between product components.

Navigation

Set Up CRM, Product Related, Quality Management, Component Definitions, Relationships

Image: Relationships page

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

Component DefinitionRelationships

Component IDKEYBOARDNameKeyboard

Parent Components

CustomizeFindView All1 of 1Last

*Parent ID	Name	Type		
BOTTOM CASING	Bottom Casing	Bottom Casing	+	-

Child Components

CustomizeFindView All1-2 of 2Last

*Child ID	Name	Type		
KEYS	Keys	Keys	+	-
POINTER	Pointer	Keys	+	-

\* Required Field

Component relationships define the component hierarchy. In the example of the laptop computer, the bottom casing includes the keyboard assembly, which is made up of individual keys. Thus, the bottom casing is the parent to the keyboard assembly, which, in turn, is the parent to the keys.

Parent ID

Select the parent component to which the defined component is related.

Name and Type

Displays the name and type of the selected parent component.

Child ID

Select the child component to which the defined component is related.

Name and Type

Displays the name and type of the selected parent component.

**Note:** To link components, both the component being linked and the component to which you are linking must have valid component definitions. If the component to which you are linking does not have a definition, you can create the definition by clicking the Component Definitions button.

To view the component relationship, return to the Component Definition page. Click the Component Hierarchy link to access the Component Hierarchy page. Click the Refresh button to display newly added components.

## Version Page

Use the Version page (RQ\_PROD\_VERS) to define distinct component versions.

### Navigation

Set Up CRM, Product Related, Quality Management, Component Versions, Version

### Image: Version page

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

The screenshot displays the 'Version' page in PeopleSoft Quality Management. The page is divided into several sections:

- Version Header:** Contains fields for Component ID (TOSHIBA 8800), Name (Toshiba Tecra 8800 Laptop), Production ID (VERSION 1), and Type (Laptop).
- Main Information:** A section with multiple fields:
  - \*Version: Version 1
  - Class: HW
  - \*Product: Computer - P5 1.1GHz Configura
  - Production date: [empty]
  - Introduced Date: [empty]
  - Phase Introduced: [dropdown]
  - Complexity: Medium
  - Lines Added: [empty]
  - Lines Deleted: [empty]
  - Lines Changed: [empty]
  - Details: [empty]
  - Predecessor ID: [empty]
  - Predecessor Name: [empty]
  - Successor ID: [empty]
  - Successor Name: [empty]
  - Date Created: 09/23/2002 4:39PM PDT
  - Last Modified: 10/11/2002 11:59AM PDT
- Responsible Parties:** A table listing users and their roles:
 

Name	*Type
Carol Hamilton	Quality Manager
Brian McGrath	Quality Analyst
Marcia Singer	Quality Development Manager
Karl Hertz	Quality Developer
Karl Hertz	Quality Analyst

\* Required Field

Products consist of components. When one or more of these components changes, you refer to the changed product as a new *version*. PeopleSoft Quality Management enables you to uniquely identify different product versions by defining different component versions. Each version represents a unique product component definition.

**Note:** When creating a new value, the Production ID is in a free form text field. The Production ID is the link between the product and the version.

### Main Information

**Version** Enter a word or phrase to describe the version build.



<b>Product</b>	Select the product that is associated with the component.
<b>Phase Introduced</b>	Select the product development phase in which this component version was introduced. Values are: <i>Alpha</i> , <i>Analysis/Design</i> , <i>Beta</i> , <i>Concept</i> , <i>Implementation</i> , <i>Maintenance</i> , <i>Production</i> , <i>Requirements</i> , and <i>Retirement</i> .
<b>Complexity</b>	Select the level of complexity that best represents what it would take to fix a defect in the component.
<b>Production Date and Introduced Date</b>	Enter the dates the product was first produced and introduced to the market.
<b>Lines Added, Lines Changed, and Lines Deleted</b>	Enter the lines of code that were added, changed, or deleted in this version. These fields apply to software code.
<b>Predecessor ID and Successor ID</b>	Enter a predecessor and successor version, if applicable.

### Responsible Parties

Generally, *responsible parties* are the team members charged with maintaining a product's quality and components. Responsible-party information entered here automatically transfers to the Defect page when the version is selected on that page.

<b>Name</b>	Select the names of responsible parties.
<b>Type</b>	Select the responsible party's role.

## Environments Page

Use the Environments page (RQ\_PROD\_VERS\_ENV) to define version environment details.

## Navigation

Set Up CRM, Product Related, Quality Management, Component Versions, Environments

### Image: Environments page

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

The screenshot shows the 'Environments' page for a specific component version. The 'Version' section at the top identifies the component as 'TOSHIBA 8800' (Name: Toshiba Tecra 8800 Laptop) with production ID 'VERSION 1' and type 'Laptop'. Below this, the 'Supported Environments' section allows configuration of technical details. Fields include 'Label' (Win NT), 'OS' (Windows NT), 'Environment', 'Network', 'Support Type' (Supported), 'OS Version', 'Platform' (Pentium III), and 'UI' (Windows 98). A 'Details' section is also present. At the bottom, the 'Date Created' is 09/23/2002 4:40PM PDT and 'Last Modified' is 10/11/2002 11:59AM PDT.

Component version environments relate only to software products and describe technical details needed to identify problems and fixes. Environment information entered here automatically transfers to the Defect page when the corresponding version is selected. This page is needed for software products only.

<b>Label</b>	Describe the component version environment.
<b>Support Type</b>	Select whether the software version has service support.
<b>OS (operating system) and OS Version (operating system version)</b>	Select the software operating system and version.
<b>Environment, Platform, and Network</b>	Select the database management system environment (for example, Microsoft SQL Server or Oracle), hardware platform, and network protocol within which the software operates.
<b>UI (user interface)</b>	Select the user interface that the software uses.

# Defining EIP Options for Integration to PeopleSoft or Oracle E-Business HCM

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## Understanding the Integration Between PeopleSoft CRM and PeopleSoft or E-Business HCM

This section discusses:

- Initial Data Load for integration with E-Business HCM.
- EIP message process.
- Request message.
- Response message.
- Inactive worker data.

### Initial Data Load for Integration with E-Business HCM

Part of the initial setup for CRM HelpDesk for Human Resources involves synchronizing certain data between the CRM and HCM systems. When integrating with E-Business HCM, data for department, job code, location, person, and workforce must be loaded from the E-Business system into flat files. This data is then loaded into the CRM system using batch processes to read each of the flat files.

### EIP Message Process

All search information is stored in the PeopleSoft CRM database. When an agent accesses the 360-Degree View page for a specific employee, a secured synchronous request is sent to PeopleSoft or E-Business HCM, depending on which system is the source of employee information.

When PeopleSoft or E-Business HCM validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by a runtime synchronous request and response message. The structure of the request and response message differs depending on which HCM is being accessed.

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

See "Understanding the 360-Degree View (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Request Message

The system sends a secured synchronous request message from PeopleSoft CRM to the PeopleSoft or E-Business HCM. The system validates the requestor's information before processing the request.

When integrating to PeopleSoft HCM, the request message contains this information:

- Authentication cookie.

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

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

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

- Language.

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

When integrating to E-Business HCM, the request message contains this information:

The request message header contains these fields:

- Responsibility Name.

The value for this is defined on the Call Center page of the User Preferences.

- Responsibility Application Name.

The value for this is defined on the Call Center page of the User Preferences.

- Security Group.

The value for this is defined on the Call Center page of the User Preferences.

- Language.

- Organization ID.

The value for this is defined on the Call Center page of the User Preferences.

The request message input parameters section includes these fields:

- EBS Person ID.

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**Note:** The EBS Person ID is not the same as the PeopleSoft Person ID.

---

- Effective Date.

The PeopleSoft system delivers these sections as options on the Define HCM Sections page. You can select or clear these options in the installation setup for your organization as a whole:

- Absence
- Benefits
- Direct Reports
- Job and Position Summary
- Pay Summary

## Response Message

The synchronous response from PeopleSoft or E-Business HCM contains a response to the information provided in the request. When integrating with PeopleSoft HCM, the system displays all error messages provided by PeopleSoft HCM (including the denial of access).

---

**Note:** You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft or E-Business HCM as well as grant security access to the information and enable single sign on in PeopleSoft or E-Business HCM. Depending on the setup in PeopleSoft or E-Business HCM, a user ID may not have access to all of the information. In that case, the response returned from the Human Resource Management system will contain an error message, such as *Secured*, for certain information.

---

## Inactive Worker Data

You can configure the system to bring inactive worker statuses into PeopleSoft CRM. The HR HelpDesk Worker 360–Degree View enables you to search for inactive workers. In addition to *Active* status, PeopleSoft HCM has 11 worker statuses that you can select from on the Worker Statuses to EIP setup page. Options include *Deceased*, *Retired*, and *Leave of Absence*.

---

**Note:** When integrating with E-Business HCM, all workers, regardless of status, are retrieved.

---

## Loading Initial Data from E-Business HCM

This section discusses how to load initial data from E-Business HCM into the CRM system.

### Pages Used to Load Initial Data from E-Business HCM

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
EBS HR HelpDesk Data Load	RC_EBS_UPLOAD	Set Up CRM, Install, EBS Data Upload, EBS Data Upload	Load initial data from E-Business HCM flat files.

## EBS HR HelpDesk Data Load Page

Use the EBS HR HelpDesk Data Load page (RC\_EBS\_UPLOAD) to load initial data from E-Business HCM flat files.

### Navigation

Set Up CRM, Install, EBS Data Upload, EBS Data Upload

### Image: EBS HR HelpDesk Data Load page

This example illustrates the fields and controls on the EBS HR HelpDesk Data Load page.

**EBS HR HelpDesk Data Load**

Run Control ID: 1 [Report Manager](#) [Process Monitor](#)

**Run Control Criteria**

Data to upload: Job Code

File Name: HR\_HelpDesk\_Full\_Synch\_message\_job.txt

**Data to upload** Select the type of data to be loaded from flat file to PeopleSoft CRM system.

**File Name** Specify the name of the flat file containing data from the E-Business HCM that is to be loaded into the PeopleSoft CRM system.

**Run** Click this button to initiate the batch process that will load the data from the specified file.

Use this page to load data for department, job code, location, person, and workforce from the E-Business HR system. Each of the specified types of data must be loaded sequentially into the PeopleSoft CRM system. Note that the data to be loaded for each batch process must be specified in a flat file.

---

**Note:** For more information on the E-Business HCM initial data load process, consult your PeopleSoft CRM Installation Guide.

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## Defining EIP Options

This section discusses how to:

- Activate and deactivate EIP subscription options.
- Make inactive worker statuses available in PeopleSoft CRM.

## Pages Used to Define EIP Options

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Define HCM Sections	RB_TD_HCM_CNTRYSEC	Set Up CRM, Common Definitions, 360–Degree View, Define HCM Sections, Define HCM Sections	<p>Activate and deactivate by country the subscription options that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources.</p> <p>The previous options are overridden by the human resources options defined on the Configure Roles page.</p>
Worker Statuses to EIP	RB_WRKR_EIP_OPN	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Worker Statuses, Worker Statuses	Make inactive worker statuses available in PeopleSoft CRM.

### Related Links

"Understanding 360-Degree View Setup (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Define HCM Sections Page

Use the Define HCM Sections page (RB\_TD\_HCM\_CNTRYSEC) to activate and deactivate by country the subscription options that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources.

## Navigation

Set Up CRM, Common Definitions, 360–Degree View, Define HCM Sections, Define HCM Sections

### Image: Define HCM Sections page

This example illustrates the fields and controls on the Define HCM Sections page.

**Define HCM Sections**

Country FRA France

**360-Degree View Section**

Sections	Enabled
Absence	<input checked="" type="checkbox"/>
Benefits	<input type="checkbox"/>
Direct Reports	<input checked="" type="checkbox"/>
Job and Position Summary	<input checked="" type="checkbox"/>
Job and Position Summary GP	<input checked="" type="checkbox"/>
Job and Position Summary NA	<input type="checkbox"/>
Pay Summary	<input checked="" type="checkbox"/>
Pay Summary GP	<input checked="" type="checkbox"/>
Pay Summary NA	<input type="checkbox"/>

Select the check boxes associated with the sections that you want the system to display on the 360-Degree View page for PeopleSoft HelpDesk for Human Resources. You can define HCM sections for each country where you process payroll.

---

**Note:** GP stands for *Global Payroll*; NA stands for *North American Payroll*.

---

## Related Links

"Understanding 360-Degree View Setup (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Worker Statuses to EIP Page

Use the Worker Statuses to EIP page (RB\_WRKR\_EIP\_OPN) to make inactive worker statuses available in PeopleSoft CRM.



## Navigation

Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Worker Statuses, Worker Statuses

### Image: Worker Statuses to EIP page

This example illustrates the fields and controls on the Worker Statuses to EIP page.

**Worker Statuses to EIP**

Select	Employee Status	Employee Status
<input checked="" type="checkbox"/>	A	Active
<input type="checkbox"/>	D	Deceased
<input type="checkbox"/>	L	Leave of Absence
<input type="checkbox"/>	P	Leave With Pay
<input type="checkbox"/>	Q	Retired With Pay
<input type="checkbox"/>	R	Retired
<input type="checkbox"/>	S	Suspended
<input type="checkbox"/>	T	Terminated
<input type="checkbox"/>	U	Terminated With Pay
<input type="checkbox"/>	V	Terminated Pension Pay Out
<input type="checkbox"/>	W	Short Work Break
<input type="checkbox"/>	X	Retired-Pension Administration

☒ [Select All](#)    ☐ [Clear All](#)

Use this page when integrating with PeopleSoft HCM to define by status which workers to bring into the CRM system. Select all of the check boxes associated with the worker statuses that you want to make available in PeopleSoft HelpDesk for Human Resources.

The system creates workers with the statuses that you selected. This information is available to agents on both the PeopleSoft HelpDesk for Human Resources Case search page and the PeopleSoft HelpDesk for Human Resources 360-Degree View page.

## Viewing HR-Related Payroll Information on the 360-Degree View Page

This section discusses how to:

- View the HR HelpDesk worker 360-Degree view.

- View the job and position summary.
- View the pay summary.
- View the payment total.
- View absences.
- View benefits.
- Viewing new action links and security roles.

## Page Used to View HR-Related Payroll Information on the 360-Degree View Page

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
360-Degree View	RB_TD_AGENT_VIEW	HRHD Worker 360-Degree View	View HR data for workers ( employees) that comes over to the CRM from the PeopleSoft or E-Business HCM.

## Viewing the HR HelpDesk Worker 360-Degree View

From the 360-Degree View page in PeopleSoft HelpDesk for Human Resources you can view fields and country-specific information for the Job and Position Summary, Pay Summary, and Benefits sections.

The PeopleSoft system also provides the ability to show the final paycheck for a terminated or retired employee on the 360–Degree View page.

Using Active Analytics Framework (AAF), functional users can create policies that identify and mark HelpDesk for Human Resources cases as secured when users save cases and the terms of the condition are met. To accomplish this, the system displays a Secured Case check box next to the Resolved by First Contact check box on the Configure Call Center Case Update Action policy page.

The 360-Degree View page also enables agents to distinguish between a person's paycheck and benefits as they relate to the person's assignments and relationship to the company. To enable help desk agents using the HelpDesk for Human Resources application to view IT help desk cases that are associated to assets for a given worker, the system displays a Help Desk Cases node on the HR HelpDesk Worker 360-Degree View page.

Fields in the Authorized Cases section on the 360-Degree View page are laid out to better reflect the importance of the fields to an agent. The system provides users with the ability to access a worker's historical, current, and future job record on the Worker component.

So that agents can only access the information that they have permission to view, PeopleSoft extended the 360 EIP to include row-level security. Rather than maintaining a second layer of security in the CRM setup pages, you only have to set up this security once. Using the Configure Roles page, you have the ability to make HR sections and subsections configurable in the HR HelpDesk Worker 360-Degree View page.

## Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Understanding 360-Degree View Setup (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Viewing Job and Position Summary

The Job and Position Summary section provides agents with a summary of the caller's job data to answer common questions about an employee's job title, location, or status.

This table describes some of the common fields that are shown in the Job and Position Summary section:

<b>Common Fields</b>	<b>Description</b>
As Of Date	Enables agents to see data for different dates. After a search, when the EIP is instantiated for the first time, the system passes the current date to the As Of Date field. All the data that appears is based on the current date. If the agent wants to see past-dated data, he or she can change the As Of Date field and click Go. This action re-instantiates the EIP.
Show Job Details for	<p>The values in this drop-down list box come from the HD_360_XREF_WK record, which is included in the HD_360_RESPONSE_SYNC message. All the unique job codes from the response message are added to the Show Job Details for field. When more than one job code is available for the person, the system adds the <i>View All</i> value to the drop-down list box. Selecting the <i>View All</i> value displays all the data for the person in the Job and Position Summary, Pay Summary, and Benefits sections. The system hides the field if the person has only one job. Job and Position Summary, Pay Summary and Benefits are filtered when the agent selects any job code. All the records that take part in the filtering are tagged with the job code.</p> <p>This field only appears when integrating with PeopleSoft HCM.</p>
Work Period	<p>The time period during which the standard hours must be completed.</p> <p>This field only appears when integrating with PeopleSoft HCM.</p>
Company	<p>A high-level entity to which all departments roll up.</p> <p>This field appears here only when integrating with PeopleSoft HCM.</p>
Establishment	<p>Organizational entities that define physical locations and specific attributes associated with the establishment.</p> <p>This field only appears when integrating with PeopleSoft HCM.</p>

<b>Common Fields</b>	<b>Description</b>
Labor Agreement	A field that is defined by customers and identify a specific labor contract.  This field only appears when integrating with PeopleSoft HCM.
Employee Category	A class of employees as defined in the labor agreement.
Person Type	A blend of the Person Organization (PER_ORG) and Person of Interest Type (POI_TYPE) fields in PeopleSoft HCM. The Job and Position Summary section on the 360-Degree View page subscribes to the Person Organization and Person of Interest Type fields in the HelpDesk 360 Response Sync Message.

If appropriate, the system automatically hides fields that are not used outside of North America. Some available fields are commonly used only in France, such as Paid Hours and Paid Work Period.

Here is an example of the Job and Position Summary (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

**Image: Job and Position Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Job and Position Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ HR Information

As Of Date 07/28/2009

▼ Job and Position Summary First 1 of 1 Last

<b>Job Code</b> 170085	<b>Job Description</b> Assistant-Senior
<b>Date of Hire</b> 01/01/2000	<b>Person Type</b> Employee
<b>Employment Status</b> Active	<b>Employment Status Date</b> 06/01/2008
<b>Position</b>	<b>Business Unit</b> FRA01
<b>Company</b> Business Institute - France	<b>Location</b> Paris
<b>Establishment</b> Paris - Headquarter	<b>Department</b> France Headquarters
<b>Supervisor EmplID</b> KF0001	<b>Supervisor Name</b> Maurice Berger
<b>Regular/Temporary</b> Regular	<b>Full/Part Time</b> Full-Time
<b>Standard Hours</b> 35.00	<b>Work Period</b> Weekly
<b>Labor Agreement</b> KF01	<b>Employee Category</b> CAD
<b>Paid Hours</b> 35.00	<b>Paid Work Period</b> Weekly
<b>Payroll System</b> Global Payroll	

The Person Type field (Organizational Relationship) enables agents to distinguish among a contingent worker, employee, or person of interest (POI) in the Job and Position Summary section for each of a worker's jobs in the scroll area.

Here is an example of the Job and Position Summary (United Kingdom) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

**Image: Job and Position Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Job and Position Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Job and Position Summary	
<b>Job Code</b> 820000	<b>Job Description</b> Specialist
<b>Date of Hire</b> 01/01/2001	<b>Person Type</b> Employee
<b>Employment Status</b> Active	<b>Employment Status Date</b> 01/01/2001
<b>Position</b>	<b>Business Unit</b> GBR03
<b>Company</b> Business Institute - UK	<b>Location</b> Reading - England
<b>Establishment</b>	<b>Department</b> Headquarters - Reading, UK
<b>Supervisor EmplID</b>	<b>Supervisor Name</b>
<b>Regular/Temporary</b> Regular	<b>Full/Part Time</b> Full-Time
<b>Standard Hours</b> 40.00	<b>Work Period</b> Weekly
<b>Labor Agreement</b>	<b>Employee Category</b>
<b>Payroll System</b> Global Payroll	

Here is an example of the Job and Position Summary section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to Oracle E-Business HCM).

**Image: Job and Position Summary section - HRHD Worker 360-Degree View page (E-Business HCM)**

This example illustrates the fields and controls on the Job and Position Summary section - HRHD Worker 360-Degree View page (E-Business HCM).

Job and Position Summary	
<b>Job Code</b> 676	<b>Job Description</b> DIR300.Director
<b>Date of Hire</b> 11/16/2008	<b>Person Type</b> Employee
<b>Employment Status</b> Active Assignment	<b>Employment Status Date</b> 07/01/1999
<b>Position</b> Director	<b>Employment Category</b> Fulltime-Regular
<b>Organization</b> Progress Finance	<b>Location</b> Progress Admin Location
<b>Supervisor EmplID</b>	<b>Supervisor Name</b> Watson, Mrs. Yvonne Michelle
<b>Standard Hours</b> 40.00	<b>Work Period</b> Week
<b>Collective Agreement</b>	<b>Employee Category</b>
<b>Payroll System</b> Bi Weekly	

This table describes the fields used in the Job and Position Summary section:

<b><i>Fields in the Job and Position Summary Section</i></b>	<b><i>Description</i></b>
Common fields available when integrating to either PeopleSoft or E-Business HCM	<p>The system displays these fields for all workers:</p> <p>Job Code</p> <p>Job Description</p> <p>Date of Hire</p> <p>Person Type</p> <p>Employee Status</p> <p>Employment Status Date</p> <p>Position</p> <p>Location</p> <p>Supervisor ID</p> <p>Supervisor Name</p> <p>Standard Hours</p> <p>Work Period</p> <p>Employee Category</p> <p>Payroll System</p>
Common fields available when integrating to PeopleSoft HCM	<p>The system displays these fields for all workers:</p> <p>Business Unit</p> <p>Company</p> <p>Establishment</p> <p>Department</p> <p>Regular/Temporary</p> <p>Full/Part Time</p> <p>Labor Agreement</p>
Common fields available when integrating to E-Business HCM	<p>The system displays these fields for all workers:</p> <p>Employment Category</p> <p>Organization</p> <p>Collective Agreement</p>

<b>Fields in the Job and Position Summary Section</b>	<b>Description</b>
U.S. fields available when integrating to PeopleSoft HCM	<p>These fields appear if the worker's regulatory region is USA:</p> <p>FLSA Status</p> <p>FICA Status - Employee</p> <hr/> <p><b>Note:</b> The system hides the FLSA Status and FICA Status-Employee fields when the employee is Canadian.</p>
France fields available when integrating to PeopleSoft HCM	<p>These fields appear if the regulatory region is FRA:</p> <p>Paid Hours</p> <p>Paid Work Period</p>

## Viewing Pay Summary

The Pay Summary section provides an agent with a summary of an employee's last confirmed paycheck. The help desk agent uses the Pay Summary section to answer common questions about the caller's net pay, taxes, and withholding amounts.

When integrating with PeopleSoft HCM, the system displays the Withholding Option section only for North American Payroll (U.S. and Canada) customers. This section includes the number of withholding allowances, special state tax information, additional percentages withheld, and additional amounts withheld at both the state and provincial and the federal levels.

To enhance PeopleSoft Global Payroll, new common fields as well as new fields for country extensions (U.K. and France) were added. PeopleSoft HCM determines which global fields are sent in the 360 Response message.

Here is an example of the Pay Summary (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

### Image: Pay Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM)

This example illustrates the fields and controls on the Pay Summary section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Pay Summary		First	1 of 1	Last
<b>Company</b>	KF1	<b>Address</b>		
<b>Job Title</b>	Director-Operations	<b>Pay Group</b> KFGMONTHLY		
<b>Payment</b>	03/31/2006	<b>Currency Code</b> EUR		
<b>Period Begin</b>	03/01/2006	<b>Period End</b> 03/31/2006		
<b>Calculation Begin</b>	03/01/2006	<b>Calculation End</b> 03/31/2006		
<b>Run Type</b>	Payroll Run Type			

Here is an example of the Pay Summary (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

**Image: Pay Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Pay Summary section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Pay Summary		First	1 of 1	Last
<b>Company</b>	KG1	<b>Address</b>		
<b>Job Title</b>	Secretary	<b>Pay Group</b> GG STD M01		
<b>Payment</b>	05/31/2008	<b>Currency Code</b> GBP		
<b>Period Begin</b>	05/01/2008	<b>Period End</b> 05/31/2008		
<b>Calculation Begin</b>	05/01/2008	<b>Calculation End</b> 05/31/2008		
<b>Run Type</b>	IMIS Payroll			

Here is an example of the Pay Summary section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

**Image: Pay Summary section - HRHD Worker 360-Degree View page (E-Business HCM)**

This example illustrates the fields and controls on the Pay Summary section - HRHD Worker 360-Degree View page (E-Business HCM).

Pay Summary		First	1 of 1	Last
<b>Company</b>	Human Resources-East	<b>Address</b> 5 Park Street Boston MA 02111, USA		
<b>Job Title</b>	DIR300.Director	<b>Pay Group</b> Vision HR Semi-Monthly		
<b>Payment</b>	06/15/2009	<b>Currency Code</b> USD		
<b>Pay Frequency</b>	Semi-Month	<b>Period End</b> 06/15/2009		
<b>Tax Location</b>	M2- Boston	<b>Federal Marital Status</b> Married		

This table describes the fields that represent common fields versus country-specific fields in the Pay Summary section:

Fields in the Pay Summary Section	Description
Common fields when integrating to E-Business HCM or for integrating to PeopleSoft HCM Payroll North America and Global Payroll	<p>These fields appear for all:</p> <p>Company</p> <p>Address *</p> <p>Paygroup</p> <p>Job Title</p> <p>Currency Code</p> <hr/> <p><b>Note:</b> * Even though Address is not a field commonly used by Global Payroll, it is included to make the common fields line up. It is coded to <i>Not Applicable</i> for Global Payroll.</p>



<b>Fields in the Pay Summary Section</b>	<b>Description</b>
Fields shown when integrating to E-Business HCM or when integrating to PeopleSoft HCM Payroll North America.	<p>For PeopleSoft HCM, these fields appear only when the employee's Pay System Flag is <i>PNA</i>:</p> <p>Period End *</p> <p>Tax Location</p> <p>Federal Marital Status</p> <p>Pay Frequency</p> <hr/> <p><b>Note:</b> * This field must appear for Global Payroll to align with the Period Begin Date field.</p>
Global Payroll-only fields	<p>These fields appear when the employee's Pay System Flag is <i>GP</i>:</p> <p>Period Begin</p> <p>Period End</p> <p>Calculation Begin</p> <p>Calculation End</p> <p>Run Type</p> <hr/> <p><b>Note:</b> Calculation begin and end dates represent the first day and the last day of the period for which this payment was calculated. Run Type represents the type of payment (for example, regular pay, bonus, and so on).</p>

## Viewing Payment Total

The system also displays the Payment Total section as a subsection of the Pay Summary when the employee's pay summary flag equals Payroll North America (PNA) or Global Payroll (GP). For Global Payroll, the group box label is called Payment Total since *paycheck* is not a commonly used term in Europe.

Here is an example of the Payment Total (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

**Image: Payment Total section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Payment Total section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Payment Total		
Description	Current	Annual
Segment Taxable Net	1866.130000	5613.310000
Segment Gross Salary	2286.740000	6860.220000
Segment Payee's contributions	485.480000	1441.520000
Segment Employer's contributio	1208.687500	3603.702500
Urssaf ceiling A of the segmen	1294.500000	3883.500000

Here is an example of the Payment Total (UK) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

Note that Check Total for Payroll North America is relabeled to Payment Total for Global Payroll, and the rows that an agent may see vary based on how you configure your Global Payroll application.

**Image: Payment Total section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Payment Total section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Payment Total		
Description	Current	Annual
Earnings	554.170000	1108.340000
Tax	110.800000	221.600000
National Insurance	11.130000	22.260000
Net Pay	432.240000	864.480000

Here is an example of the Payment Total section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

**Image: Payment Total section - HRHD Worker 360-Degree View page (E-Business HCM)**

This example illustrates the fields and controls on the Payment Total section - HRHD Worker 360-Degree View page (E-Business HCM).

▼ Withholding Options			▼ Payment Total		
Type	Federal	MA	Type	Current	YTD
Withholding Allowances	2	1	Total Earnings	6469.31	150805.02
Special State Tax Info		0	Taxable Gross	6296.53	147694.98
Additional Percent	0.000%	0.000%	Total Taxes	1251.34	33796.09
Additional Amount	0.00	0.00	Total Deductions	176.93	3184.74
Override Tax Amount	0.00	0.00	Net Pay	5009.22	113251.43
Override Tax Percent	0.000%	0.000%			

This table describes the fields used in the Payment Total section:

<b>Fields in the Payment Total Section</b>	<b>Description</b>
Description (PeopleSoft HCM) or Type (E-Business HCM) column.	<p>For PeopleSoft HCM, this data appears under the Description column only when the employee's Pay System Flag is <i>PNA</i>:</p> <p>Total Earnings</p> <p>Taxable Gross</p> <p>Total Taxes</p> <p>Total Deductions</p> <p>Net Pay</p> <p>*****</p> <p>For PeopleSoft HCM, depending on the country, this data appears under the Description column only when the employee's Pay System Flag is <i>GP</i>:</p> <p>Segment Taxable Net (France)</p> <p>Yearly Gross Salary (France)</p> <p>National Insurance (France)</p> <p>Segment Payee's contribution (France)</p> <p>Segment Employer's contribution (France)</p> <p>Urssaf ceiling A of the segment (France)</p> <p>Earnings (UK)</p> <p>Tax (UK)</p> <p>National Insurance (UK)</p> <p>Net Pay (UK)</p>
Current column.	Displays the current amount for the field on the corresponding line under the Description or Type column in the grid.
Annual (PeopleSoft HCM) or YTD (E-Business HCM) column	Displays the annual amount for the field on the corresponding line under the Description or Type column in the grid.

## Viewing Absences

With the introduction of Global Payroll to the 360-Degree View, it is common for employees to call the help desk with questions about absence accruals and balances. European countries track more absence types than the U.S. typically tracks.

Furthermore, customers need the ability to tailor the absence section to meet their individual country's needs. PeopleSoft HCM offers absence management as a separate product; therefore, the Absence section is a separate section in the 360-Degree View page, and it has no ties to the Pay Summary section.

Here is an example of the Absence (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

**Image: Absence section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Absence section (U.K.) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Absence		
Description	Entitlement Balance	As of Date
SSP Absence	25.00	03/31/2006

Here is an example of the Absence (France) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

**Image: Absence section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM)**

This example illustrates the fields and controls on the Absence section (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

▼ Absence		
Description	Entitlement Balance	As of Date
Paid Vacation Days balance	25.00	03/31/2006
Paid Vacation Days entitlement	25.00	03/31/2006

Here is an example of the Absence section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

**Image: Absence section - HRHD Worker 360-Degree View page (E-Business HCM)**

This example illustrates the fields and controls on the Absence section - HRHD Worker 360-Degree View page (E-Business HCM).

▼ Absence		
Description	Entitlement Balance	As of Date
Vacation PTO	12.00	06/15/2009
Sick Leave	12.00	06/15/2009

## Requirements for Absence

Using the 360-Degree View configuration, you can enable or disable the Absence section on the 360-Degree View page. When integrating to PeopleSoft HCM, the 360-Degree View page can display the Absence section with or without payroll data for both Payroll North America and Global Payroll.

The absence configuration defined in PeopleSoft HCM determines how columns are labeled in the Absence grid. You can, however, configure the section name as the terminology varies from country to country (for example, *Absence*, *Leave*, and so on).

The 360-Degree View page subscribes to and displays the following fields:

<b>Field</b>	<b>Description</b>
Description	The description of the absence type (for example, PTO, sick, vacation, and so on).
Entitlement Balance	The grand total, positive or negative, accrued by the worker for the absence type.
As of Date	The date as of which the entitlement balance was last calculated.

## Viewing Benefits

The Benefits Information section provides the help desk agent with a summary of the caller's benefits to help them answer common questions about health plans, level of coverage, contributions to a savings plan, and coverage for dependents and beneficiaries.

Here is an example of the Benefits section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

### Image: Benefits section - HRHD Worker 360-Degree View page (PeopleSoft HCM)

This example illustrates the fields and controls on the Benefits section - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Benefits Information

First 1 of 1 Last

Benefit Record Number 0

Currency Code USD

COBRA Event Identification 0

Type of Benefit	Plan Description	Coverage or Participation
Medical	Non-Netwk	Family
Dental	Enh Dental	Family
Vision	VIS Std	Family
Life	Basic Life	\$ 50000
Supp Life	2x Salary	Salary X 2
AD/D	ADD 25K	\$ 25000
Dep AD/D	Dpnd AD&D	\$ 10000
Dep Life	DepLife EE	\$10000
Supp AD/D	SuppADD5	\$ 500000
STD	STD 50%	50% of Salary
LTD	LTD 50	50% of Salary
401(k)	401k Pct	3% Before Tax and 3% After Tax
Profit Shr	Profit	Participating
ESPP	ESPP	1% After Tax
Sick	GBI Sick	Participating

Name	Relationship	Type of Benefit	Coverage
Megan Santos	Spouse	Medical	Covered
Megan Santos	Spouse	Dental	Covered
Megan Santos	Spouse	Vision	Covered
Megan Santos	Spouse	Life	100%
Megan Santos	Spouse	Supp Life	100%
Megan Santos	Spouse	AD/D	70%
Megan Santos	Spouse	Dep AD/D	Covered
Megan Santos	Spouse	Dep Life	Covered
Megan Santos	Spouse	Supp AD/D	70%
Megan Santos	Spouse	401(k)	70%
Megan Santos	Spouse	Profit Shr	70%
Megan Santos	Spouse	ESPP	25%
Megan Santos	Spouse	US Pensn 1	25%
Marguerite Santos	Child	Medical	Covered
Marguerite Santos	Child	Dental	Covered

Here is an example of the Benefits section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

**Image: Benefits section - HRHD Worker 360-Degree View page (E-Business HCM)**

This example illustrates the fields and controls on the Benefits section - HRHD Worker 360-Degree View page (E-Business HCM).

Benefits Information			
Benefit Record Number		0	
Benefits			Dependents/Beneficiaries
Type of Benefit	Plan Description	Coverage or Participation	
Medical	Aetna (PPO)	EE & Family	
Dental	Comprehensive Dental Plan	EE & Family	
Vision	Vision Plan 1	EE & Family	
Life	AD & D	3 X Compensation	
Life	Life	3 X Compensation	
Life	Spousal Life	Decline Coverage	
Life	Dependent Life	\$10,000	
Life	Business Travel Accident Insur	\$50,000	
Disability	Long Term Disability	66 2/3% of Annual Compensation	
Name	Relationship	Type of Benefit	Coverage
James,Stephanie	Spouse	Medical	COVERED
James,Stephanie	Spouse	Dental	COVERED
James,Stephanie	Spouse	Vision	COVERED
James,Robert Jr.	Child	Medical	COVERED
James,Robert Jr.	Child	Dental	COVERED
James,Robert Jr.	Child	Vision	COVERED
James,Stephanie	Spouse	Life	100
James,Stephanie	Spouse	Business Travel Accident Insur	100

The Benefits grid contains information regarding the individual's coverage. The Dependents/Beneficiaries grid contains information regarding the coverage for the individual's dependents and beneficiaries.




This information comes from E-Business HCM or from the PeopleSoft HCM Base Benefits module. When using PeopleSoft HCM, data is available to support the U.K. and France. The U.K. currently uses the Base Benefits module to manage benefit enrollment for employees.

## Direct Reports

Here is an example of the Direct Reports section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to E-Business HCM).

**Image: Direct Reports sections - HRHD Worker 360-Degree View page (E-Business HCM)**

This example illustrates the fields and controls on the Direct Reports sections - HRHD Worker 360-Degree View page (E-Business HCM).

Direct Reports				
Name	Employee ID	Location	Employment Status	Add Case
Chen,Mrs. Micheal	1535	Boston Mfg Plant 2 used in Ope	Active Assignment	 <a href="#">Add Case</a>
McAllister,Mr. Lindsay	1560	Boston Mfg Plant 2 used in Ope	Active Assignment	 <a href="#">Add Case</a>
Gootee,Mr. Satish	1549	Boston Mfg Plant 2 used in Ope	Term w/Pay	 <a href="#">Add Case</a>

## United Kingdom Requirements

For UK customers, the system displays Company Car in the Benefits sections. The system displays the attributes of the car, such as make and model, if the attributes are included in the 360 Sync Response message.

Here is an example of the Benefits and Direct Reports (U.K.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

### Image: Benefits Information and Direct Reports sections (United Kingdom) - HRHD Worker 360-Degree View page (PeopleSoft HCM)

This example illustrates the fields and controls on the Benefits Information and Direct Reports sections (United Kingdom) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Benefits Information				
Benefit Record Number	0	Currency Code GBP		
COBRA Event Identification	0			
Benefits				
Type of Benefit	Plan Description	Coverage or Participation		
Comp. Car	CCARUK	MER C220CDI		
Dependents/Beneficiaries				
No Benefits exist for Dependents/Beneficiaries.				
Direct Reports				
Name	Employee ID	Location	Employee Status	Add Case
Robin de la Camara	KG0009	Reading - England	Active	<a href="#">Add Case</a>

## Requirements for France

Since France does not use Base Benefits to manage employee benefits enrollments, the system does not display information in the Benefits Information section. Instead, it displays this message: *No Benefits Information exists for this person.*

Here is an example of the Benefits and Direct Reports (France.) section from the Human Resources HelpDesk (HRHD) Worker 360-Degree View page (when integrating to PeopleSoft HCM).

### Image: Benefits Information and Direct Reports sections (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM)

This example illustrates the fields and controls on the Benefits Information and Direct Reports sections (France) - HRHD Worker 360-Degree View page (PeopleSoft HCM).

Benefits Information	
No Benefits Information exists for this person.	
Direct Reports	
No Direct Reports exists for this person.	

## Viewing New Action Links and Security Roles

Agents use action links when the information on the Worker 360-Degree View page is insufficient to answer the caller's questions. The agent can create a case for the caller and transfer to the pages in PeopleSoft or E-Business HCM directly from the case to find additional HR-related information.



With the introduction of Global Payroll, PeopleSoft CRM added new action links to the interface with PeopleSoft HCM versions 8.9 and above. This table lists the action links associated with PeopleSoft Global Payroll information:

<b>Action Link Category</b>	<b>Link</b>
Benefits	Car Allocation Car Plan
Human Resources	Update Contract
Global Payroll - France	Payslip — FRA Request Loans — FRA Garnishments —FRA
Global Payroll - UK	Payslip — GBR Review Loans — GBR Maintain Loans — GBR Absence Event — GBR
Global Payroll - Core	Bank Account Net Pay Elections Absence Event

The system displays the action links on the Case page based on the agent's security access. If the agent doesn't have access, the system does not display the link in the action category drop-down list box.



## Chapter 9

# Defining Options for Integration to PeopleSoft Campus Solutions

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## Understanding the Integration Between PeopleSoft CRM and PeopleSoft Campus Solutions

This section discusses:

- EIP message process.
- Request message.
- Response message.

### EIP Message Process

All search information is stored in the PeopleSoft CRM database. When an agent accesses the 360-Degree View page for a specific constituent, a secured synchronous request is sent to PeopleSoft CS.

When PeopleSoft CS validates the request, a response is sent to PeopleSoft CRM, and the information is used to display the 360-degree view of the employee. The EIP message is implemented by the SCC\_CONSTITUENT Integration Broker service and its associated synchronous service operation and request and response messages.

See "Understanding 360-Degree View Setup (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

### Request Message

The system sends a secured sync request message from PeopleSoft CRM to PeopleSoft CS. The system validates the requestor's information before processing the request.

The request message contains this information:

- EmplID (employee ID) from the 360-Degree View search page.
- Checklist, Communications, and Comments (3C) option (to indicate if data for this section is being requested).
- Admissions option (to indicate if data for this section is being requested).
- Transfer Credits option (to indicate if data for this section is being requested).
- Academics option (to indicate if data for this section is being requested).
- Finances option (to indicate if data for this section is being requested).

- Financial Aid option (to indicate if data for this section is being requested).
- Transcript option (to indicate if data for this section is being requested).
- Contributor Relations option (to indicate if data for this section is being requested).
- Affiliations option (to indicate if data for this section is being requested).
- Language Code.

The language that the agent uses to log on to the application. The default value is (*%language*). PeopleSoft Campus Solutions retrieves information based on the language code in the request for internationalization support.

## Response Message

The sync response from PeopleSoft CS contains a response to the information provided in the request.

The response contains multiple rowsets that provide data for the summary (profile) section of the 360-degree view page and for all of the requested sections that are specific to the 360-Degree View for Higher Education (Checklist, Communications, and Comments; Admissions; Transfer Credits; Academics; Finances; Financial Aid; Transcript; Contributor Relations; and Affiliations).

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**Note:** You must establish the same user IDs for both PeopleSoft CRM and PeopleSoft CS as well as grant security access to the information and enable single sign on in PeopleSoft CS. Depending on the setup in PeopleSoft CS, a user ID may not have access to all of the information.

When all data for a particular 360-degree view section originates from the same component in PeopleSoft CS and the user does not have security access to the component, the word *Secured* is displayed instead of showing the details for that section. However, if data for the section originates from different components and the user has access to some but not all of those components, all details in the section are displayed but the fields for which the user has no security will appear blank

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## Viewing Campus Solutions-Related Information on the 360-Degree View Page

This section discusses how to:

- View the Constituent 360-Degree view page (for HR HelpDesk for Higher Education).
- View the checklist, communications, and comments section.
- View recruiting information.
- View admissions information.
- View information for the credit transfer.
- View academics information.
- View finances information.
- View financial aid information.

- View transcript information.
- View affiliations information.
- View information on contributor relations.

## Page Used to View Campus Solutions-Related Information on the 360-Degree View Page

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
360-Degree View	RB_TD_AGENT_VIEW	Constituent 360-Degree View	View academic-related data for a constituent that comes over to PeopleSoft CRM from PeopleSoft Campus Solutions.

## Constituent 360-Degree View Page

Use the Constituent 360-Degree View page (RB\_TD\_AGENT\_VIEW) to view academic-related data for a constituent that comes over to PeopleSoft CRM from PeopleSoft Campus Solutions.

## Navigation

Constituent 360-Degree View

### Image: Constituent 360-Degree View page (1 of 7)

This example illustrates the fields and controls on the Constituent 360-Degree View page (1 of 7).

**360-Degree View**

Refresh | New Search | Notification | Correspond | Academics | >> Personalize

360-Degree View | Relationship Viewer | Tasks | Call Reports

\*Role: Individual Consumer Actions: Add Case Go

**Summary**

Name: Daniel Delgado ID: ADCRM1003  
 Home Phone: 818/555-4455 Campus ID: CIDADCRM1003  
 Business Email: HCMGENUser1@ap6023fems.us.oracle.com  
 Home Address: 32833 Elm Street Encino, CA 91436-2311  
 Current Status: Prospect 2007 Fall

[View Consumer Details](#)

### Image: Constituent 360-Degree View page (2 of 7)

This example illustrates the fields and controls on the Constituent 360-Degree View page (2 of 7).

**Activities**

\*Date Filter: 7 - View All First | Previous | Next | Last | Left | Right

**Overview of - Daniel Delgado**

- Global Cases
  - Related - (0)
  - Not Related - (2)
  - [View All](#)
- Cases
  - Authorized Cases - (0)
  - [View All](#)
  - Unauthorized Cases - (0)
  - [View All](#)
  - [Add Case](#)
  - [Search Cases](#)
- Installed Products - (0)
- Assets - (0)
- Service Orders - (0)
- Change Requests - (0)
- Work Orders - (0)
- Defects - (0)
- Leads - (0)
- Opportunities - (2)
- Marketing Activities - (0)
- Events
- Interactions - (0)

† Date filter does not apply to this node

**Global Cases (Related)**

No Global Cases (Related) to display.

**Add Interaction Note**

**Current Actions**

**Image: Constituent 360-Degree View page (3 of 7)**

This example illustrates the fields and controls on the Constituent 360-Degree View page (3 of 7).

Higher Education Information							
Checklists/Communications/Comments							
Checklists							
Function	Institution	Checklist Type	Checklist	Item	Status	Due Date	Date Time
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Recommendation Letter	Completed	05/01/2007	05/30/2007
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Academic Transcripts	Completed	05/01/2007	05/30/2007
Admissions Application	Great Lakes University	Requirements List	UGRD App Materials-Transfer	Transfer Statement	Completed	05/01/2007	05/30/2007

Communications								
Function	Institution	Category	Method	Direction	Letter	Status	Date Completed	Date Time
Admissions Application	Great Lakes University	Undergraduate App Processing	Document	Incoming Communication		Y	06/01/2007	05/30/2007
Admissions Application	Great Lakes University	Undergraduate App Processing	Document	Incoming Communication		Y	02/01/2007	05/30/2007
Admissions Program	PeopleSoft University	Grad Application Decision	Letter	Outgoing Communication	Grad Admit	Y	05/15/2007	05/30/2007

**Image: Constituent 360-Degree View page (4 of 7)**

This example illustrates the fields and controls on the Constituent 360-Degree View page (4 of 7).

Comments					
Function	Institution	Category	Comment ID	Name	Date Time Created
Admissions Application	PeopleSoft University	Graduate Applications	KU0007	Betty Locherty	05/30/2009 7:09:57PM
Admissions Application	PeopleSoft University	Graduate Evaluations	KU0007	Betty Locherty	05/30/2009 7:08:59PM
Admissions Application	PeopleSoft University	Graduate Evaluations	KU0007	Betty Locherty	05/30/2009 7:08:11PM

Recruiting	
<b>Institution</b> Great Lakes University	<b>Career</b> Graduate
<b>Admit Type</b> Graduate First Year	<b>Admit Term</b> 2007 Fall
<b>Recruiting Status</b> Applicant	<b>Source Date</b> 05/05/2007
<b>Last School Attended</b>	<b>Graduation Date</b>
<b>School Type</b>	<b>Campus</b> Main Campus

Program Information				
Program	Lifecycle Status	Date	Academic Plan	Sub-Plan
Arts & Sciences	Prospect	01/20/2009	Mathematics	

**Image: Constituent 360-Degree View page (5 of 7)**

This example illustrates the fields and controls on the Constituent 360-Degree View page (5 of 7).

Admissions			
<b>Institution</b> PeopleSoft University		<b>Application Number</b> 00024574	
<b>Career</b> GRADUATE		<b>Application Date</b> 06/13/2008	
<b>Admit Type</b> Transfer		<b>Admit Term</b> 2007 Fall	
<b>Application Fee Status</b> Pending		<b>Primary Program</b> GRADUATE SCIENCE PROGRAMS	
<b>Program Status</b> Active		<b>Program Action Date</b> 05/30/2009	
<b>Program Action</b> Matriculation		<b>Program Action Reason</b>	
Plans and Sub-Plans			
Customize   Find   First 1 of 1 Last			
Academic Plan	Description	Sub-Plan	Description
CHEM-MS	Chemistry (MS)		
Transfer Credits			
No Transfer Credit Information has been added.			
Academics			
<b>Institution</b> PeopleSoft University		<b>Career</b> GRADUATE	
<b>Program</b> GRADUATE SCIENCE PROGRAMS		<b>Program Status</b> Completed Program	
<b>Admit Term</b> 2007 Fall		<b>Campus</b> Main Hacienda Campus	
<b>Cumulative Units</b> 27.000		<b>Expected Grad Term</b> 2008 Spring	
Plans and Sub-Plans			
Customize   Find   First 1 of 1 Last			
Academic Plan	Description	Sub-Plan	Description
CHEM-MS	Chemistry (MS)		

**Image: Constituent 360-Degree View page (6 of 7)**

This example illustrates the fields and controls on the Constituent 360-Degree View page (6 of 7).

Recent Term			
<b>Term</b> 2008 Spring		<b>Primary Program</b> GRADUATE SCIENCE PROGRAMS	
<b>Academic Load</b> Enrolled Full-Time		<b>Approved Load</b> Full-Time	
<b>Term Units</b> 15.000		<b>Academic Standing</b>	
Finances			
Find   View All   First 1 of 2 Last			
<b>Business Unit</b> Glake Bursar		<b>Amount Due Now</b> 1,989.00 USD	
<b>Deposit Due</b> 0.00 USD		<b>Overall Due</b> 1,989.00 USD	
<b>Anticipated Aid</b> No		<b>Payment Plan</b> None	
<b>Last Bill Date</b> 06/05/2009		<b>Last Refund Date</b>	
<b>Last 1098 T Year</b> 2009		<b>1098 T Status</b> AWAITING CONSENT	
Financial Aid			
Find   View All   First 1 of 4 Last			
<b>Institution</b> Great Lakes University		<b>Aid Year</b> Financial Aid Year 2007 - 2008	
<b>Aid Application Date</b> 06/18/2009		<b>Aid Processing Status</b> Packaging Completed	
<b>SAP Status</b> Meets SAP		<b>Aid Offered</b> Yes	
<b>Aid Accepted</b> All		<b>Aid Disbursed</b> All	
<b>Last FAN Date Time</b> 06/08/2009 3:44:29PM		<b>FAN Status</b> Printed	



### Image: Constituent 360-Degree View page (7 of 7)

This example illustrates the fields and controls on the Constituent 360-Degree View page (7 of 7).

The screenshot displays the 'Transcript Requests' section of the Constituent 360-Degree View page. At the top, there is a header bar with a dropdown arrow and the text 'Transcript Requests'. To the right of this header are links for 'Find', 'View All', 'First', '1 of 2', and 'Last'. Below the header, the main content area is divided into two columns. The left column contains the following fields: 'Institution' with the value 'PeopleSoft University', 'Transcript Type' with the value 'ALLOF', and 'Request Status' with the value 'Completed'. The right column contains: 'Request Date' with the value '06/02/2009', 'Description' with the value 'Official Transcripts - All', and 'Request Reason' with the value 'Web Transcript Request'. Below these fields, there are two sections: 'Contributor Relations' and 'Affiliations'. Both sections have a blue header bar with a dropdown arrow and the section name. The 'Contributor Relations' section contains the text 'No Contributor Relation Information has been added.' The 'Affiliations' section contains the text 'No Affiliation Information has been added.'

From the 360-Degree View page in PeopleSoft Service Center for Higher Education you can view fields for the sections on Checklist, Communications, and Comments; Recruiting; Admissions; Transfer Credits; Academics; Finances; Financial Aid; Transcript; Contributor Relations; and Affiliations.

So that agents can only access the information that they have permission to view, the 360 EIP includes row-level security. Rather than maintaining a second layer of security in the CRM setup pages, you only have to set up this security once. Using the Configure Roles page, you have the ability to configure which Campus Solutions sections are available for a user with that role who accesses the Constituent 360-Degree View page.

### Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Configuring the 360-Degree View Search Page (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Viewing Checklists, Communications, and Comments

This section includes data from the checklists, communications, and comments associated with the constituent to help provide agents with helpful information as they work on that person's request or issue.

Checklists, communications, and comments provide a way to track and analyze correspondence, lists of requirements, and notes about constituents.

- Checklists are used to assign lists of requirements to individuals, organizations, events, or groups of individuals and to monitor constituent's progress toward completing those requirements.
- Communications enable users to track and analyze all of the institution's contacts with students, staff, constituents, and organizations inside and outside the institution. Note that the Constituent 360-Degree View only displays communications to and from constituents.
- Comments enable users to track remarks, explanations, or clarifications about individuals and organizations. Note that the Constituent 360-Degree View only displays comments regarding constituents.



<b>Field</b>	<b>Description</b>
Item	Items available for specific checklists.
Status	The Checklist Status.
Due Date	The date by which the checklist must be completed for the constituent.
DateTime	Date and time when checklist was created.

## Communications

<b>Field</b>	<b>Description</b>
Function	The code for the functional area with which the constituent is associated.
Institution	Institution associated with this communication.
Category	The category of communication context to indicate why a communication was sent or received
Method	Indicates the form of a communication (for example, letter, email, or phone call).
Direction	The direction of a communication, such as in person, incoming communication, or outgoing communication.
Letter	The letter code for a communication. The code specifies the variable data associated with this communication.
Status	The communication status. Valid values are <i>Completed</i> or <i>Not Completed</i> .
Date Completed	Date when the communication was completed.
Communication Date	Date the communication was created.

## Comments

<b>Field</b>	<b>Description</b>
Function	The code for the functional area with which this constituent is associated.
Institution	Institution associated with this comment.
Category	The business need with which this comment is associated.

<b>Field</b>	<b>Description</b>
Comment ID	ID of the person entering the comment
Name	The name of the person entering the comment.
DateTime	Date and time when the comment was created.

## Viewing Recruiting Information

This section provides a summary of a suspect's or prospect's academic interest.

The information in this section is stored in and retrieved from the PeopleSoft CRM system: it is not part of the EIP message to PeopleSoft Campus Solutions.

When there is no program information for a given institution and career, academic information is retrieved for data where the recruiting status is *Suspect*, *Prospect*, or *Applicant*.

When there is program information for a given institution and career, academic information is displayed for any program where the constituent's lifecycle status is *Suspect*, *Prospect*, or *Applicant*.

### Image: Recruiting section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Recruiting section of 360-Degree View for Higher Education page.

The screenshot shows the 'Recruiting' section of the 360-Degree View for Higher Education page. At the top, there are navigation links: Find, View All, First, 1 of 2, and Last. Below this, the following information is displayed:

- Institution:** Great Lakes University
- Career:** Graduate
- Admit Type:** Graduate First Year
- Admit Term:** 2007 Fall
- Recruiting Status:** Applicant
- Source Date:** 05/05/2007
- Last School Attended:**
- Graduation Date:**
- School Type:**
- Campus:** Main Campus

Below this information is a table titled 'Program Information' with the following columns: Program, Lifecycle Status, Date, Academic Plan, and Sub-Plan. The table contains one row of data:

Program	Lifecycle Status	Date	Academic Plan	Sub-Plan
Arts & Sciences	Prospect	01/20/2009	Mathematics	

<b>Field</b>	<b>Description</b>
Institution	Institution that is recruiting the potential suspect or prospect.
Career	Prospective academic career in which a suspect or prospect has an interest, such as <i>Undergraduate</i> , <i>Graduate</i> , or <i>Continuing Education</i> .
Admit Type	Admit type for this suspect or prospect, such as <i>First-Year</i> , <i>Second-Year</i> , or <i>Transfer</i> .
Admit Term	The admit term in which the suspect or prospect is expected to enroll.
Recruiting Status	Indicates the level of interest, at the academic career level, that the prospective student has in the institution.

<b>Field</b>	<b>Description</b>
Source Date	Career source date for which the program status record was added. The source date is the date that the data was loaded
Last School Attended	Suspect or prospect's last school attended.
Graduation Date	Graduation date from the last school the suspect or prospect attended. This may be a future date.
School Type	School type (for last school attended) of the suspect or prospect.
Campus	Suspect or prospect's prospective campus if applying to the institution. The campus is associated with the program and is often where the student will attend classes.
Program	Suspect or prospect's prospective interest in an academic program such as <i>Graduate of Fine Arts Program</i> .
Lifecycle Status	The individual's Lifecycle Status indicates the perceived level of interest, at the academic program level, that a potential student has in the institution. For example, a person who attended an on-campus event may be considered a suspect (someone who you suspect is interested in the institution). A person who requests a catalog may be considered a prospect (someone who has indicated interested in the institution).
Status Date	Date for which the program status was added.
Plan	Academic plan for which a suspect or prospect has indicated a potential interest.
Sub-Plan	Suspect or prospect's potential interest in a specific academic Sub-Plan. Sub-Plans are areas of further specialization within an academic plan.

## Viewing Admissions Information

This section displays a constituent's admissions information. The data originates from the Admissions page of the Student Service Center and the Application Data component in Campus Solutions.

If the constituent is applying for multiple sub-plans within one plan (such as multiple specialties or concentrations), the grid displays a row for each sub-plan.

**Image: Admissions section of 360-Degree View for Higher Education page**

This example illustrates the fields and controls on the Admissions section of 360-Degree View for Higher Education page.

**Admissions** Find | View All First 1 of 3 Last

**Institution** PeopleSoft University **Application Number** 00024572  
**Career** GRADUATE **Application Date** 06/13/2008  
**Admit Type** First-Year **Admit Term** 2010 Fall  
**Application Fee Status** Pending **Primary Program** GRADUATE LIBERAL ARTS PROGRAMS  
**Program Status** Applicant **Program Action Date** 05/29/2009  
**Program Action** Application **Program Action Reason**

**Plans and Sub-Plans** Customize | Find | First 1 of 1 Last

Academic Plan	Description	Sub-Plan	Description
EDPOL-MA	Educational Policy-MA		

Field	Description
Institution	Institution to which the constituent is applying.
Application Number	Unique identification number of the application. The application number will display as zeros if an application has not yet been created.
Career	Name of the career for which the constituent is applying.
Application Date	The date on which the application was received.
Admit Type	Admit type for this application.
Admit Term	The admit term in which the applicant is expected to enroll.
Application Fee Status	Current application fee status for the application. Values include: <i>Received</i> , <i>Pending</i> , and <i>Waived</i> .
Primary Program	The academic primary program to which the constituent is applying.
Program Status	Constituent's program status. Possible values are <i>Active</i> , <i>Admitted</i> , and <i>Waitlisted</i> .
Program Action Date	The date that the action was entered into the system.
Program Action	Program action designates the status of a constituent in a program from the time he or she is an applicant and throughout the constituent's academic career. For example, a constituent must have a program action of <i>Matriculate</i> to become a student, and a program action of <i>Activate</i> in any term in which he or she wants to enroll.

<b>Field</b>	<b>Description</b>
Program Action Reason	Indicates why a particular program action was taken, or provides a further description of the program action. For example, the institution can record that an applicant has withdrawn an application for an academic program.
Plan	Academic plan for which a suspect or prospect has indicated a potential interest.
Sub-Plan	Suspect or prospect's potential interest in a specific academic Sub-Plan. Sub-Plans are areas of further specialization within an academic plan.

## Viewing Transfer Credits Information

The Transfer Credits section enables agents to view high level transfer credit information for students.

### Image: Transfer Credits section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Transfer Credits section of 360-Degree View for Higher Education page.

Transfer Credits	
<b>Credit Type</b> Course Credit	<b>Credit Source</b> University of Omaha
<b>Institution</b> Great Lakes University	<b>Career</b> UNDERGRADUATE
<b>Program</b> ARTS & SCIENCES	<b>Articulation Term</b> 2007 SUMMER
<b>Model Status</b> Posted	<b>Units Transferred</b> 3,000

<b>Field</b>	<b>Description</b>
Credit Type	Identifies the type of credit information being displayed. Valid values are: <i>Course Credit</i> , <i>Test Credit</i> , and <i>Other Credit</i> .
Credit Source	Identifies the source of the credit. For <i>Course Credit</i> this is the institution in which the constituent earned credits that are being transferred. For <i>Test Credit</i> and <i>Other Credits</i> this field is blank.
Institution	Academic institution for which the specified individual's transfer credit was processed.
Career	Academic career for which you want to retrieve the specified individual's transfer credit summaries.
Program	Academic program for which you want to retrieve the specified individual's transfer credit summaries.
Articulation Term	Term for which the target institution processes the constituent's transfer credit.
Model Status	The status of the transfer credit model. Valid values are: <i>Submitted</i> , <i>Completed</i> , or <i>Posted</i> .

<b>Field</b>	<b>Description</b>
Units Transferred	The units of the internal equivalent course. Only those units that have been posted will be displayed.

## Viewing Academics Information

The Academics section provides academic advisors and other users with an overview of a student's academic information.

The system uses the current term, closest future term, or most recent past term (in that order) to determine which term to display as the most recent term. The specific logic used for this process is:

- Choose the term with the smallest term code in which the *Term Begin Date* is less than or equal to today's date and the *Term End Date* is greater than or equal to today's date.
- If none of the student's terms satisfy the above criteria, choose the student's term with the smallest term code in which the *Term Begin Date* is greater than today's date.
- If none of the student's terms satisfy the above criteria, choose the student's term with the highest term code in which the *Term End Date* is less than today's date.

The data is sorted alphabetically by Institution, Career, and Program.

### Image: Academics section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Academics section of 360-Degree View for Higher Education page.

<b>Field</b>	<b>Description</b>
Institution	Name of institution in which student is enrolled.
Career	Academic career for the constituent.
Program	The academic program in which the student is enrolled.
Program Status	Student's program status.



<b>Field</b>	<b>Description</b>
Admit Term	The admit term in which the student is enrolled.
Campus	The campus is associated with the program and is often where the student is attending classes.
Cumulative Units	Includes all passed units including both enrollment and transfer credit.
Expected Grad Term	Term and year in which the student is expected to graduate.
Plan	Academic plan within the academic program.
Sub-Plan	Area of further specialization within an academic plan.
Term	Most recent term for which a constituent has enrolled or has completed.
Primary Program	The constituent's primary academic program for the specified career and term combination.
Academic Load	The student's academic load for the specified career and term combination.
Approved Load	The academic load for which the student is enrolled, and which is approved by the institution for the term.
Term Units	Student's consolidated units for the most recent term.
Academic Standing	Academic status of the constituent.

## Viewing Financial Information

The Finances section displays pertinent information regarding the students' account.

### Image: Finances section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Finances section of 360-Degree View for Higher Education page.

▼ Finances		Find   View All	First 1 of 2 Last
<b>Business Unit</b>	Glake Bursar	<b>Amount Due Now</b>	1,989.00 USD
<b>Deposit Due</b>	0.00 USD	<b>Overall Due</b>	1,989.00 USD
<b>Anticipated Aid</b>	No	<b>Payment Plan</b>	None
<b>Last Bill Date</b>	06/05/2009	<b>Last Refund Date</b>	
<b>Last 1098 T Year</b>	2009	<b>1098 T Status</b>	AWAITING CONSENT

<b>Field</b>	<b>Description</b>
Business Unit	A business unit can have its own set of business rules that enable campuses to operate independently from each other financially. You must set up at least one business unit.

<b>Field</b>	<b>Description</b>
Amount Due Now	Includes any charges incurred through the current date plus the number of days specified for the days in future for the <i>due now</i> field on the Institution Set page associated with the business unit.
Deposit Due	Deposits incurred to date.
Overall Due	Represents past due, current due, and any future due charges for the business unit.
Anticipated Aid	Student's pending or anticipated aid that has not been posted to their account. Values are <i>Yes</i> or <i>No</i> .
Payment Plans	Indicates whether a student is currently on a payment plan.
Last Bill Date	The last date a bill was generated for the student.
Last Refund Date	The last date a refund was generated for the student.
Last 1098 T Year	Year for which the Last 1098 T was generated for the student.
1098 T Status	Captures the status of the student's 1098-T. Values are: <i>Transmitted</i> , <i>Printed</i> , and <i>Awaiting Consent</i> .

## Viewing Financial Aid Information

The Financial Aid section provides users with the ability to see whether financial aid has been offered, accepted, or disbursed, as well as the date and status of the last financial aid notification letter sent.

### Image: Financial Aid section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Financial Aid section of 360-Degree View for Higher Education page.

Financial Aid	
<b>Institution</b>	Great Lakes University
<b>Aid Application Date</b>	06/18/2009
<b>SAP Status</b>	Meets SAP
<b>Aid Accepted</b>	All
<b>Last FAN Date Time</b>	06/08/2009 3:44:29PM
<b>Aid Year</b>	Financial Aid Year 2007 - 2008
<b>Aid Processing Status</b>	Packaging Completed
<b>Aid Offered</b>	Yes
<b>Aid Disbursed</b>	All
<b>FAN Status</b>	Printed

<b>Field</b>	<b>Description</b>
Institution	Name of institution for which the constituent is applying for financial aid.
Aid Year	The financial aid year.
Aid Application Date	The date the student turned in an application or the date that identified the student as a possible recipient for financial aid.

<b>Field</b>	<b>Description</b>
Aid Processing Status	Indicates the processing status for a student financial aid package.
SAP Status (Satisfactory Academic Progress Status)	Indicates whether the student is meeting satisfactory academic progress (SAP). This is used to determine whether to award federal aid to the student. The SAP global disbursement rules use this field to determine whether to authorize disbursement of the student's award. Also, Common Line Disbursement Hold and Release processing uses this field to determine whether a hold should be placed on the student's Common Line loan.
Aid Offered	Indicates if aid has been offered based on the total of all disbursements for all awards that fall in the same aid year.  Valid values are <i>Yes</i> (aid has been awarded) or <i>No</i> (no aid awarded).
Aid Accepted	Indicates if the student has accepted any offered aid. The valid values are <i>No</i> , <i>Partial</i> , or <i>All</i> .
Disbursed Aid	Indicates whether aid has been disbursed to the student's financial account. Valid values are <i>No</i> , <i>Partial</i> , or <i>All</i> .
Last FAN Date	Indicates the date and time the Financial Aid Notification (FAN) letter was created.
FAN Status	Indicates whether the FAN letter has been printed, is awaiting printing, is being revised or has an error.

## Viewing Transcript Request Information

This section provides users with an overview of a student's transcript requests.

### Image: Transcript Request section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Transcript Request section of 360-Degree View for Higher Education page.

▼ Transcript Requests Find | View All First 1 of 2 Last

**Institution** PeopleSoft University **Request Date** 06/02/2009

**Transcript Type** ALLOF **Description** Official Transcripts - All

**Request Status** Completed **Request Reason** Web Transcript Request

<b>Field</b>	<b>Description</b>
Institution	Name of institution in which student is requesting a transcript.
Request Date	Date student requested the transcript.
Transcript Type	Transcript student is requesting such as <i>Official</i> or <i>Unofficial</i> transcript.

<b>Field</b>	<b>Description</b>
Request Status	The transcript status.
Request Reason	Reason for the transcript request. The reason appears on the transcript if the transcript type is set to display request reason information.

## Viewing Contributor Relations Information

This section displays a record of lifetime gifts and pledges made by a constituent and by other individuals with whom the constituent has a personal or organizational relationship.

### Image: Contributor Relations section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Contributor Relations section of 360-Degree View for Higher Education page.

▼ Contributor Relations

Find | View All | First | 1 of 1 | Last

Institution

PeopleSoft University

Lifetime Open Pledges

0.00 USD

Lifetime Hard Credits

8,000.00 USD

Total Years Giving

3

Lifetime Commitments

20,000.00 USD

Lifetime Gifts/Payments

20,000.00 USD

Total YTD Giving

0.00 USD

Consecutive Years Giving

Relationships

Customize | Find | 1-3 of 3 | First | Last

Name	Relationship	Lifetime Commitments	Currency	Lifetime Open Pledges	Currency	Lifetime Gifts/Payments	Currency
Hamilton,Francesca Elizabeth	Spouse	20,000.00	USD	0.00	USD	20,000.00	USD
Hamilton,James Otto	Son	1,000.00	USD	0.00	USD	1,000.00	USD
Hamilton,Lawrence Stanley	Brother	14,000.00	USD	0.00	USD	14,000.00	USD

<b>Field</b>	<b>Description</b>
Institution	Name of institution with which the constituent or relative has a history of giving money.
Lifetime Commitment \$	Displays the total amount of money ever donated or pledged by the donor.
Lifetime Open Pledge \$	Displays the total amount of money promised but not yet donated by the donor.
Lifetime Gift/Payments \$	Displays the total amount of money ever given by the donor. This amount only includes money actually received, and excludes outstanding pledges.
Lifetime Hard Credits \$	Displays the total amount of hard credit given to the donor for recognition purposes.
Total YTD Giving \$	Displays the total amount in gifts and pledge payments the donor made to the allocation account during this fiscal year.

<b>Field</b>	<b>Description</b>
Total Years Giving	Displays the total number of years in which the donor has given to the institution. Only hard credit recognition is used to calculate this field.
Consecutive Years Giving	Displays the total number of consecutive years in which the donor has given to your institution. The value in this field resets to zero if more than one year has passed since the donor's most recent gift.

## Relationships

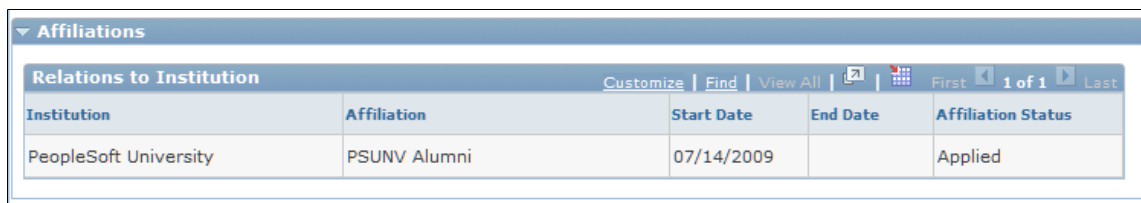
<b>Field</b>	<b>Description</b>
Name	Displays the name of the donor.
Relationship	Displays the donor's relationship to the constituent. Only active relationships are displayed.
Lifetime Gift/Payments \$	Displays the total amount of money ever donated by the donor who has a relationship with the constituent. This amount only includes money actually received, and excludes outstanding pledges.
Currency	Currency of the Lifetime Commitments, Lifetime Open Pledge, and Lifetime Gifts/Payments.

## Viewing Affiliations Information

This section provides a history of the constituent's active and inactive relationship with the institution.

### Image: Affiliations section of 360-Degree View for Higher Education page

This example illustrates the fields and controls on the Affiliations section of 360-Degree View for Higher Education page.



Relations to Institution				
Institution	Affiliation	Start Date	End Date	Affiliation Status
PeopleSoft University	PSUNV Alumni	07/14/2009		Applied

<b>Field</b>	<b>Description</b>
Affiliations	Indicates the constituent's relationship to the institution.
Start Date, End Date	Start and end dates of the affiliation.
Affiliation Status	Indicates the current state of the affiliation. Valid values are <i>Active</i> or <i>Inactive</i> .



# Managing Cases

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## Understanding the Configurable Case

In PeopleSoft CRM one Case component supports all PeopleSoft CRM Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education applications, as well as the related industry solutions.

The system stores the display template family code within the Case component. The display template family code identifies the type of the Case and may provide several display template IDs that a user can choose from.

Display template IDs control the appearance and behavior of the Case component and its pages to support the varied business needs of call centers. An implementer can choose to show or hide pages, sections, and fields. An implementer can also control field labels.

---

## Understanding Case Access

This section discusses:

- Case creation.
- Case retrieval.
- Saved searches.

### Related Links

"Understanding 360-Degree View Setup (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

[Managing Related Cases](#)

[Defining Call Center Business Units](#)

## Case Creation

You can create new cases in several ways:

- Navigate to your PeopleSoft call center application (Support, HelpDesk, HR HelpDesk, or Analyst Service Center) and select Add Case.

When users want to add new cases, they are taken directly to the Case component in Add mode.

Users can search for customers or employees directly on the Case page, thus increasing efficiency and usability. Users can also enter information about the case before identifying the customer.

As delivered, the Analyst Service Center provides creation and retrieval of three different types of case (each based on a separate Display Template ID). These cases are tailored for Information

Technology (IT)-related cases, non-IT (support) cases, and blended cases (which may be used to track either IT or non-IT cases).

---

**Note:** You can also use the Support Center, Help Desk Center, or HR Help Desk Center links from the Home page to navigate through the applications and add new cases.

---

- Use Quick Create functionality.

Use the Quick Create function to create new customers, consumers, contacts, workers, and POIs quickly.

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

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

---

**Note:** An agent may also use the 360-Degree View page without CTI to gather information about the customer before entering a new case.

---

- Clone an existing case by clicking the Clone Case button on the case toolbar.

Use this method when the new case is substantially similar to another case.

- Create a new case from the Related Cases page of an existing case.

Use this method when the new case is related to an existing case. This method enables you to establish the relationship between the cases at the same time that you create the new case.

Using this method, you can select the type of information to copy to the new case. If you do not copy caller information, you can identify the caller using the appropriate fields on the new Case page.

- If an implementer enables the Agent - My Cases pagelet, agents can create cases without leaving their personal case access portal.
- In the email workspace, agents can make use of email handling options to create and associate a case to an email to support the completion of the correspondence.
- If an implementer enables the configuration option for a group worklist to create cases for new inbound email, the system creates a case for each incoming unstructured email that ERMS receives and routes to that group worklist.

See "Group Worklist Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

- If enabled at the HCM installation level, the CRM system automatically creates HR HelpDesk cases when the job-related or personal data is updated in the HCM system it integrates with. See [Understanding Automatic Case Creation For HCM Updates](#)

---

**Note:** To generate a case ID before a case is saved, implementers and administrators can select the Case ID Before Save check box on the Call Center Definition - Options page. This feature is useful if you want to provide customers with a case ID before the agent enters all the problem information. Note that if the agent provides the customer with a case ID for their reference and the agent tries to save a case and is not able to, the customer has a case ID that is not recorded in the system.

---



## Default Contact Information

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

For PeopleSoft Support, when a user selects both the customer and contact, the contact information is obtained from the contact's preferred primary phone and email information.

For PeopleSoft HelpDesk and HelpDesk for Human Resources, a user selects an employee rather than a customer and contact. They can also enter an alternative contact in addition to an employee. In this case, the contact information comes from the alternative contact instead of the employee.

For PeopleSoft Service Center for Higher Education, user may select an individual consumer (a category which includes individual students), a company and contact, or an employee (staff or faculty member).

## Case Retrieval

Access an existing case directly from your My Cases pagelet or use the Case Search page. You can perform a search based on case information (such as the case number) or caller information.

If you know the case number, you do not have to identify the business unit before searching. If you are searching based on other criteria, enter a business unit before performing the search.

---

**Note:** The number and type of information fields on the Case Search page that are used to search for cases is determined in the Configurable Search Definition, which is associated to the Display Template.

---

See "Understanding Display Templates (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)", "Understanding the Configurable Search (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

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

---

**Note:** When a case is secure, only agents in the assigned provider group are authorized to open the case. If you use CTI or the 360-Degree View page to access the Case page and the system tries to send the case to an agent who is not authorized, the agent receives a message stating that he or she is not authorized to open the case. To avoid this situation, consider the secure case scenario when you configure your routing rules.

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## Related Links

[Understanding Call Center Business Units](#)

"Understanding CTI (*PeopleSoft CRM 9.2: Multichannel Applications*)"

"Using PeopleSoft Support Pagelets (*PeopleSoft CRM 9.2: Portal Pack*)"

## Saved Searches

Saved searches enable you to reuse case search criteria. The system saves searches under your user ID by maintaining separate lists of saved searches for each user.

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

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

### Related Links

"BO Searches on Configurable Search Pages (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

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## Understanding Case Management

This section discusses:

- Case page activities.
- Quick codes.
- Case information security.
- Case assignments.
- Case visibility
- Case closure.
- Case toolbar functions.
- Toolbar functions.
- Background processing.

---

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

---

### Case Page Activities

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

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**Note:** Sections marked with an asterisk (\*) are delivered enabled when you first install the application. The display template controls the visibility of the other sections.

---

- Customer information section. \*

This section is titled Employee Information for PeopleSoft HelpDesk applications.

- Academic Information section (associated only with PeopleSoft Service Center for Higher Education).
- Problem section. \*
- Case Information section. \*
- Actions section. \*
- Add a note section.
- Incident address section.

See [Understanding Processing a Case](#).

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Customer Information Section

In PeopleSoft Support, the case's Customer Information section contains customer fields. The same section for a PeopleSoft HelpDesk or HelpDesk for Human Resources case contains employee fields.

In Service Center for Higher Education, you can search for a company (and company contact), consumer, or worker. Note that students (constituents) have the role of consumer within the Service Center for Higher Education application, while staff and faculty have the role of worker. An individual with the role of company contact who also has the role of consumer or worker will show up multiple times in the search results (both as an individual and as a representative of the company). However, individuals who are not company contacts will show up only once in the search results, even if they have both the role of consumer and worker.

Consider the following when using the Customer Information section:

- If you are searching for a company, you can enter a partial value in the Company field and click the Search button.

The system returns a list of companies that begin with the value you entered in the Company field. If only one company matches your search, the system displays a page with all of the contacts for that particular company. When creating a case for a company, you must identify a contact person. A contact person is optional if you are creating a case for a consumer.

- If you are searching for a consumer, you can enter a partial value in either the First Name or Last Name field and click the Search button.

Do not enter anything in the Company field.

- If you want to edit a contact's contact method for the case, click the Edit link to launch the Edit Contact Information page.

This page lists the contact information for the selected contact. The system lists only address information for HelpDesk for Human Resources cases.

- Business Object Search functionality controls the appearance of customer search fields and some of the other fields.

---

**Note:** For PeopleSoft HelpDesk applications, the appearance of certain fields is controlled by the secure worker role.

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See "Understanding BO Search and Quick Create Setup (*PeopleSoft CRM 9.2: Business Object Management*)".

- If a case is created automatically by the system for an inbound email message (a feature that can be enabled in any group worklist definition with the installation of ERMS), the email sender (identified by the email address) is populated as the customer contact of the case.

If the email address does not match any of the customer record in the CRM system, one of these two things happens based on the setup of the mailbox to which the inbound email is routed—either a new customer (a Person record) is created using the email address and becomes the contact of the case, or the *Anonymous User* person record is used as the customer (consumer) of the case. On the other hand, if multiple matches are found for the email address, the Select Sender link appears in the Customer Information section, indicating that the call center agent needs to choose an email sender as the case customer.

A case customer must be identified before a case can be saved, unless the Anonymous Caller option is selected on the case.

See "Group Worklist Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

The Customer Information Section is grouped using an expandable group box layout. Use the display template to control how the fields appear in each section.

---

**Note:** If you select an incorrect company, you can search again to select the appropriate company. For PeopleSoft HelpDesk customers, one person can enter a case on behalf of another person. You can select the employee associated with the case, select an alternative contact, and then click the Edit button to enter contact details for the case.

---

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Academic Information Section

This section is enabled for cases in Service Center for Higher Education. It displays a summary of the academic information (such as institution, program and plan) that is associated with the constituent. The fields in this section are not editable (any required updates to the information should be processed in the PeopleSoft Campus Solutions application).

Because individuals may be linked to more than one institution, program, plan, or sub-plan, the information in this section is presented in a scroll area, so that multiple sets of information may be viewed.

## Problem Information Section

This section discusses two fields: Summary and Description.

The Summary field is required. The system can be configured so that values for the Summary and Description fields can be entered by default on the Case page when the user selects a quick code. If a problem summary is already entered on an existing case, a quick code will not overwrite the Summary and Description fields unless the overwrite check box is selected for either the Summary or Description

fields in the quick code. In this case, you can overwrite the values for the Summary and Description fields even if these fields are already populated.

---

**Note:** Call center agents can also use text trays and quick keys to automatically fill static and dynamic data into the Description field.

---

See "Understanding the Text Tray (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Case Information Section

The fields in the Case Information section are grouped using the configurable Embedded Tabs section layout. By default, the system displays the Main and More tabs. Use the display template to determine the number of tabs, their labels, and the fields that you want to appear.

This section discusses how to:

- Secure a case.
- Enable the creation of a case with an anonymous caller.
- Enable the creation of a case that specifies a site as the customer rather than a person or company.

This capability is useful for service calls that must be specified by location rather than by a contact name or billing entity.

- Display the business unit associated with the case.
- Select a quick code.

You can configure a quick code to populate other fields.

- Categorize a case.

The Category, Specialty Type, and Detail fields can affect the way in which the system assigns provider groups and agents to the case.

- Assign a case.

You can assign a case in many ways. You can configure the system to automatically suggest a provider group and agent.

- Associate and describe a product for which support is extended.

You can record its placement within a product hierarchy, serial number, where it was purchased, and whether it is installed.

- Record asset information.

You can track company equipment with identification numbers and track whether the equipment is installed.

- Track the reported problem.

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

- Perform an entitlement search.

PeopleSoft call center applications enable you to set up agreements and warranties that govern and track a customer's or an employee's entitlement to support. To control the way the system searches for agreements, you can use the configuration options available on the Agreement Search Configuration page. You can also use the Active Analytics Framework (AAF) to set up automatic agreement searches.

See "Understanding Agreements and Warranties (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

- Authorize a credit card.
- Review response times.

You can view the service-level agreement information about expected and actual response and restore times. A customer's entitled response and restore time takes a business's hours of operation into consideration. The system uses the same logic for holiday schedules. If an agreement is entitled with regular hours of operation but the business is closed on public holidays, the entitlement takes the holiday schedule into account. On the Service Level page, you can use the Holiday Schedule field to select the holiday schedule that you want associated with the service level. The system provides the holiday schedule by default to the agreement line when the service level is specified.

- Review survey scores.

If you have permission to view the Survey Score field, you can review the scores generated by the surveys that were sent to customers by email. You can also review the actual survey by clicking a link on the Related Actions page in the Case component after the customer has filled out the survey. This field, however, does not appear on the page unless you enable it on the Display Template - Page Definition page. You must also sign in as a user with permission to view this field; otherwise, it does not appear on the page. You can set up your system so that an agent can send a survey manually to a customer's email address, or you can use AAF to automatically send surveys to customers when agents close cases. To run and view reports that show survey scores for particular agents or types of cases, refer to the documentation for your PeopleSoft CRM Online Marketing application.

## Actions Section

The link categories that you or your implementation team set up during installation appear in the Actions section on the main Case and Summary pages. You can link to pages such as those in the HR database (used in HelpDesk for Human Resources) or the PeopleSoft Campus Solutions application (used in PeopleSoft Service Center for Higher Education), or you can link to related actions, business projects, change requests, and so on.

Using AAF policies or by selecting a quick code, you can configure your system to automatically suggest an action. You also can manually select an action from the Actions section.

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

See [Link Group Page](#).

## Add a Note Section

The Add a Note section, which is delivered as hidden, provides a note field on the main Case page. Each time users open a particular case, they can only add one note on the Case page. Once a note has been added on the Case page, it may be edited there, if desired, until the user exits the case. However, to add

additional notes without exiting and re-opening the case, the user must use the Notes page. On the Notes page, agents can always add new notes, as well as view and edit existing notes.

---

**Note:** To create a note using text tray functionality, you need to be on the Notes page.

---

See [Adding Notes and Attachments](#).

## Incident Address Section

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

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

In this group box, you can:

- Enter either a street address or the intersection for the incident.
- Describe additional information about the location using free-form text.

## Related Links

[Basic Link Setup](#)

## Quick Codes

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

- Note (Summary and Description)
- Problem (Summary and Description)
- Case Status
- Case Priority
- Case Impact
- Urgency
- Case Severity
- Provider Group
- Assigned To
- Case Type
- Case Subtype
- Category
- Specialty Type
- Detail

- Error Code
- Error Message
- Interested Parties
- Product ID
- Product Group
- Suggested Action (Link Category, Version, Link Name)
- Solution and solution status
- Name Change
- Location Change
- Early Retirement

## Case Information Security

You can control the visibility of the Secured check box by using a display template. When an agent determines that a case is sensitive, he or she can select the Secured check box in the Case Information section of the template to specify that the case should be viewed only by individuals associated with the provider group on the case.

When a case is marked secured, the agent must specify a provider group before saving the case. Once the agent secures the case, it is associated with the provider group. Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, the agent cannot access the secured case.

---

**Note:** Security is implemented on specific pages throughout the system. If your organization modifies the system to show case summary information on additional pages, you must secure the information appropriately.

---

The word *Secured* is substituted for the case summary on the following pages:

- Case Search.

*Secured* appears in the Problem Summary field of the search results grid both when accessing a case and when searching for a case to relate to another case.

---

**Note:** The other fields in the search results grid display actual case data; therefore, agents can view the case status or the assigned agent without accessing the case. This limited visibility enables even non-authorized agents to provide limited support when callers inquire about a secure case. The link to access the case, however, is disabled for unauthorized users.

---

- 360-Degree View for authorized and unauthorized cases.

The 360-Degree View page for PeopleSoft HelpDesk for Human Resources and the Constituent 360-Degree View page for Service Center for Higher Education each have two case nodes, one for cases that cannot be accessed (unauthorized) and one for those that can (authorized).



*Secured* appears if the Case node in the action tree is configured to show the case summary. You can also configure the unauthorized node to show the summary of the secured case. The 360-Degree View page for PeopleSoft HelpDesk for Human Resources and for Service Center for Higher Education is delivered showing only the case status and count. For 360-Degree Views that are not related to these two applications, secure cases are not hidden or disabled on these pages or sections.

- Related Cases.
- Solution - Related Actions.
- Solution pages.

*Secured* appears in the search results grid.

- Worklist.

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

- Email notifications (automated and manual).

The PeopleSoft system does not prohibit users from emailing case information to other users who don't have access to the case (for example, through the Outbound Notification page). The summary does not change for email notifications about secured cases.

---

**Note:** When an agent prompts for cases, the system displays only those cases that the agent is authorized to access. To access a secured case, the agent must be a member of the provider group associated with the case.

---

## Configuration Issues for Secured Cases

To avoid sending out information about secured cases when you are setting up AAF policies, business projects, workflow actions, and email templates, use the Secured Case field (SECURE\_CASE\_FLG) on the Case page (RC\_CASE) to define record field conditions.

For example, suppose you want to suppress secured cases from being viewed by unauthorized users. You can define an event to perform a check for a value equal to *N* on the SECURE\_CASE\_FLG field before displaying or distributing case information.

---

**Note:** Secured case functionality can be used by any call center application. However, this functionality is delivered only for PeopleSoft HelpDesk for Human Resources. The secure case flag is part of a condition to make sure you don't send out secure information. AAF policies do not automatically treat secured cases as special.

---

## Case Assignments

You can assign a case to any worker except future-dated workers. The worker to whom a case is assigned is the case owner, even if other agents or specialists are helping the assignee.

You can also assign cases to provider groups rather than to individual agents. Provider groups are pools of agents with something in common, like agents who support a certain product or work at a particular call center.

You can assign cases by:

- Entering the provider group or agent name manually.
- Invoking the assignment engine, which suggests an assignee.

The assignment engine attempts to match the person or provider group with all of the competencies associated with the case category, type, or detail, whichever level is appropriate for the case.

Additionally, because you can associate competencies with problem types, the assignment engine attempts to match the person or provider group with the competencies listed for the problem.

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

See "Understanding Assignment Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

---

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

---

- Entering a quick code.

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

- Having the system assign the case at save time.

Auto-assignment options that are configured in the Call Center Business Unit component occur only if you have not already assigned the case. If you use AAF policies to assign the case, the event definitions determine the conditions under which the assignment occurs.

## Assignment Notifications

The PeopleSoft system delivers call center workflow to send notifications when a case is assigned or reassigned.

If you assign cases to provider groups (without specifying an agent within the group), you can use AAF policies to send an assignment notification to the provider group's worklist. Usually, the worklist monitor assigns the worklist item, the case, or both to an individual. The PeopleSoft system is not delivered with this workflow turned on, however. To use this functionality, you must reset the end date in the AAF policy.

## Related Links

### Defining Call Center Business Units

"Understanding Provider Groups and Group Members (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding Assignment Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Case Visibility

To prevent employees from viewing sensitive case information (for example, grievances) through the HelpDesk self-service applications, the PeopleSoft system includes a value called *Internal, exclude Case Contact* in the Visibility drop-down list box on the main Case page.

When a user selects *Internal, exclude Case Contact*, the employee who is the subject of the case is unable to view the case through the HelpDesk self-service application.

The person who reported the case (Reported By) can view it in the self-service application if the case is not secured. When a case is secured, the Reported By person will no longer be able to view the case in the self-service application.

When an agent selects the *Internal, exclude Case Contact* visibility value and clicks the Notification button, the system displays a warning message to the agent that the employee does not have visibility to this case. In this situation, you would not want to send a notification to the employee.

The system does not display the employee name and email address in the Recipients grid on the Outbound Notification page.

The Case Contact role query has been modified so that it won't return the case contact when the agent selects the *Internal, exclude Case Contact* visibility value. This modification prevents the agent from sending a notification to the employee in question.

To update a secured case when the visibility is *Internal, exclude Case Contact*, the PeopleSoft system has a new policy called Case Visibility Changed.

When a case is secured, an agent that does not belong to the provider group can't open the case. This safeguard prevents the agent from opening the case from the 360-Degree View page and discussing it with the employee in question.

---

**Note:** This feature is only applicable to PeopleSoft HelpDesk and HelpDesk for Human Resources.

---

## Case Closure

The Case Status field on the Case page shows where the case is in its life cycle. You close a case by selecting the appropriate status in the Case Status field.

Case status values vary by implementation, but all case statuses fall into one of these categories:

- Open
- Closed
- On Hold
- Canceled

These processing rules are based on the case status categories:

- Your business unit settings determine whether you can reopen canceled or closed cases.

You can also set up the Call Center Definition - Case Defaults page to change the status automatically when an agent obtains a successful resolution.

See [Understanding Call Center Business Units](#)[Understanding Display Templates](#).

- When you close a case, the current date and time are entered in the Closed Date field; if you reopen the case, the Closed Date field is cleared.
- If a case is associated with a solvable action, you can close the case by selecting the action.
- You cannot close a case until it has either a resolution associated with it or a solvable action associated with it.

You can set up your system to prevent the closing of cases unless there is a business project associated with the case. To do this, however, the business project related action must be marked as solvable on the Link Definition page. If the business project is marked as solvable and it is associated with the case, the business project doesn't need to be closed before you can close the case.

- You can set up the system at the business unit level to allow cases to be resolved after sending outbound notifications from them.

When this option is selected, the Send and Solve toolbar button appears on the Outbound Notification page. When the user finishes composing the message and clicks the button, the system sends the notification out to recipients and solves the associated case transaction by setting its status to the predefined resolved case status (for example, *Closed - Resolved*).

If the outbound notification requires approval from a supervisor, the system resolves the associated case upon receipt of the approval from the supervisor.

See [Business Unit - Options Page](#).

When cascading statuses through related cases, these rules also apply:

- Changing the parent case's status changes the status of all child cases unless:
  - The child case is associated with an open case.
  - The child case is in a closed or canceled status that is not the same as the parent's original status.
- You can close a case using more than one resolution.
- Closing a parent case cascades the successful solution to the child cases that are associated with the parent case.
- Reopening a parent case changes the successful solutions in the child cases to failed solutions.
- When a case is closed, it becomes read-only except for the Case Notes and Resolution Status fields.

This flexibility accommodates instances for which multiple resolutions can close a case for that business unit.

---

**Note:** A solvable action will not cascade to the other cases, but a successful resolution will.

---

## Related Links

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

"Understanding Case, Service Order, and Defect Resolution (*PeopleSoft CRM 9.2: Services Foundation*)"

"Understanding Entitlement Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Case Toolbar Functions

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

See "Understanding the Configurable Toolbar (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

The PeopleSoft system delivers configurable toolbar definitions, one for each application.

### Common Call Center Toolbar Buttons

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

- Print
- Spell Check
- 360-Degree View
- 360-Degree Search
- Text Tray
- Notification
- Email
- Time Entry
- Search
- Next
- Add
- Update
- Clone Case
- Correspondence

### Additional Toolbar Buttons for PeopleSoft Support

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

- Upsell
- Order
- Map Dashboard
- CTI Dialout

If customers implement their own CTI switch, they need to implement a new Javascript function that is specific to the CTI switch. PeopleSoft CRM delivers a Javascript function that works with the delivered CTI definitions, so when an agent clicks the button, an outbound call is made for the phone number listed on the case. If customers have a specific CTI switch implementation, they must add a new Javascript function for the implementation (the Javascript function file should be located in the <PS\_HOME>/cs/ps/pCti directory) and register it in the CTI component of the CRM system.

See "Setting Up CTI System Definitions (*PeopleSoft CRM 9.2: Multichannel Applications*)".

- Get Offer/Promotions

---

**Note:** You must use PeopleSoft's AAF functionality to activate the Get Offer/Promotions button; this functionality is not delivered. When AAF policy conditions are met, the existing Upsell Configuration on Case action displays the Get Offers icon on the Case toolbar. This action is modifiable to present the Get Offers/Promotions button based on rules that are evaluated by the existence of a third-party optimization engine. Agents can also initiate branch scripts associated with the offer for scripted selling.

---

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

See [Understanding Link Setup](#).

## Additional Toolbar Buttons for PeopleSoft HelpDesk

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

- Asset Discovery

Provided that system and data integration has been accomplished, this button launches an asset management application, which passes the desired asset information to the application for reporting.

You can also launch asset discoveries from the:

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

- Remote Control

The Remote Control button launches a third-party remote control process that enables an IT agent to:

- Remotely query for data from an installed product or asset.
- Run a process to remotely take control of an employee's computer to resolve a problem.

See [Integrating with Third-Party Asset Management Applications](#).

## Additional Toolbar Buttons for PeopleSoft Service Center for Higher Education

In addition to the common buttons, the toolbar for PeopleSoft Service Center for Higher Education may contain these buttons (depending on whether the user has accessed an IT, non-IT, or blended case):

- Upsell Opportunity Alert

- Order
- Map Dashboard
- CTI Dialout

If customers implement their own CTI switch, they need to implement a new Javascript function that is specific to the CTI switch. PeopleSoft CRM delivers a Javascript function that works with the delivered CTI definitions, so when an agent clicks the button, an outbound call is made for the phone number listed on the case. If customers have a specific CTI switch implementation, they must add a new Javascript function for the implementation (the Javascript function file should be located in the <PS\_HOME>/cs/ps/pCti directory) and register it in the CTI component of the CRM system.

See "Setting Up CTI System Definitions (*PeopleSoft CRM 9.2: Multichannel Applications*)".

- Asset Summary
- Remote Control

The Remote Control button launches a third-party remote control process that enables an IT agent to:

- Remotely query for data from an installed product or asset.
- Run a process to remotely take control of an employee's computer to resolve a problem.

## Notifications

The Notification toolbar button provides convenient access to case-related communication and worklist tasks. Clicking this button:

- Launches the Outbound Notification page for users to compose and send email and worklist notifications.
- Launches the email workspace for users to respond to existing email messages that are associated with the case. Email workspace can be used for sending new adhoc emails based on system setup.

This function is available with the installation of Multichannel Communications.

## Time Tracking

When you create a new case, the system creates a time record for the case. For the system to do this, you must first set up autonumbering for time records.

---

**Important!** Because the system creates a time record for every case, you must set up autonumbering for time records even if you don't track the time that you spend working on cases.

---

To track the time that you spend working on a case, click the Track Time button in the case toolbar to access the Manage Time page.

Use the Manage Time page to record the start and end times for each block of time that you work on the case. Unless the case is resolved during the first call, separate time records will exist for the different blocks of time spent working on the case. Every person who works on a case needs to record time separately.

The time entry record is created the first time that the case is saved in the agent-facing component. For cases created elsewhere (for example, cases created in self-service, through cloning, or through related case functionality), the system does not create the time record until the case is accessed and saved in the agent-facing component. If a user clicks the Track Time button for a case that does not yet have a time record, the system prompts the user to save the case first.

When you add a new row to the time record, the system enters the name of the currently assigned agent to that row. If your name does not appear as the currently assigned agent, change this value to your own name.

The system enters the current date and time as the start time. These default values are helpful for agents who create the time record when they start working on a case and then return to the time record later to enter the end time. If you create the record at the end of a block of time when you've worked on the case, you must override the default start time.

---

**Note:** If an existing case has time recorded, and an agent subsequently changes the Business Unit on the case, the existing time entries will be updated to the new Business Unit.

---

## Upsell Opportunities

This functionality is available only in PeopleSoft Support and PeopleSoft Service Center for Higher Education.

If a caller reports a problem with an old or superseded product, you might want to recommend that the caller upgrade to a newer product. A flashing button, which appears on the toolbar on the Case page, alerts agents to a potential upsell opportunity.

The flashing button is triggered based on conditions set up in an AAF policy. For example, you can trigger the upsell toolbar button to flash when a customer is identified or when a product is selected and the case has a specified priority.

The Branch Script tool is used to recommend a product to upsell. Branch scripts are associated with specific products. Clicking the button launches a branch script and adds it to the list of related actions for the case.

---

**Note:** You can also control how the toolbar buttons behave using AAF policies.

---

See "Action Configuration Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

From the Actions section on the Case page or from the Related Actions page, you can transfer directly to the Order Capture page. Whenever possible, the system maps branch script answers to corresponding fields on the Order Capture page. This mapping is accomplished using variables associated with the branch script. For example, the system maps the Product field (if it appears) to the Order Capture page.

## Text Trays

Call center agents can use text trays and quick keys to auto-fill static and dynamic data, reply to emails, create text for ad hoc notifications or emails, or create notes about a case.

You can use both public and personal quick keys in text tray-enabled text fields within transaction pages. You can also create and maintain your own set of personal quick keys.



Administrators and implementers can manage and create public quick keys. They can create two types of quick keys:

- Dynamic quick keys are comprised of static text and a dynamic token, which pulls the value from the database.
- Static quick key always resolve to straight text.

You can create quick key categories and edit existing and delivered categories, edit existing quick keys, group quick keys into categories, and determine the key sequence for hot keys.

You can use the Quick Code functionality to auto-populate these fields in PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources:

- Problem - Description field on the Case page.
- Details field on the Notes page.

For example, you can have a quick code that automatically fills out the case and inserts text into the Problem - Description field. Included in this text could be the #123 quick key code, which would resolve to text through the Text Tray functionality.

See [Quick Code Page](#).

See "Understanding the Text Tray (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Toolbar Functions

Access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, or Service Center for Higher Education. The toolbar at the top of the Case page and all pages in the Case component include a row with buttons and a time zone control.

The toolbar configuration controls which buttons appear. As delivered, the button row in the toolbar displays some or all page elements. Page elements that are common across all applications are documented in *PeopleSoft CRM 9.2: Automation and Configuration Tools*.

See "Understanding the Configurable Toolbar (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".



Click the Print button to launch a separate browser window that you can use to print case information and change print options.



Click the Time Entry button to access the Manage Time page, where you can track the time that you spent working on the case. You are prompted to save the case before you access the Manage Time page. This button appears only after an agent saves the case for the first time.



Click the Text Tray button to launch the Text Tray page, where you can select a quick key that will automatically enter pre-written text into the Description field on the Case page and the Detail field on the Notes page in the Case component.



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

---

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

---

See "Configuring Searches (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".



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 automatically populates the customer and product data on the Entry Form page.



Click the Upsell button to run the upsell script. This button appears only if an upsell script is associated with the product and if other business unit-specific upsell criteria are met. This icon changes to a coin based on the base currency.

The upsell functionality is specific to PeopleSoft Support.



Click the Asset Summary button to launch an asset management application, which passes the desired asset information to the application for reporting.



Click the Remote Control button to launch a remote control process that enables an IT agent to remotely query for data from an installed product or asset or to run a process to remotely take control of an employee's computer.



Click the CTI Dialout button to launch the Outbound Call page to enable a user to direct the CTI console to dial a telephone number displayed on that page. Outbound calling works only when the CTI console is enabled and the user has registered with the CTI vendor.



Click the View Worklist button to launch the My Worklist page. The agent uses the Worklist page to efficiently manage personal work tasks and responsibilities.

---

**Note:** You must set up this button on the Toolbar Definitions pages during setup.

---

See "Understanding the Configurable Toolbar (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

### History

Select a value and click the green arrow to return to the selected page. This field appears if you access the Case page through a page other than the Case Search page.

### Current user time

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

### Time zone

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

*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.

### Related Links

[Reviewing Case History](#)

"Understanding Manual Notifications (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Understanding the Configurable Toolbar (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Background Processing

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

### Active Analytics Framework (AAF)

PeopleSoft AAF is a suite of tools comprising a closed-loop decision-making system where you can address specific business issues. Applications can respond when certain conditions are met and certain actions are recommended.

Actions include giving a priority service or a better discount for high-value customers, identifying fraudulent transactions, and displaying alerts and warning messages.

At runtime, applications send requests to the AAF decision engine to evaluate all of the policies pertaining to a trigger point. For policies whose conditions are evaluated as true, the system invokes their associated actions.

Your organization can set up AAF policies to trigger various actions under specified conditions. The AAF decision engine can perform several actions that are transparent to the person who triggers the action.

AAF policies can:

- Send general-purpose notifications.
- Send notifications related to entitlements.

Agreement lines provide customers with specific entitlements such as guaranteed response times and recovery times. Each entitlement can be associated with a workflow rule that sends a notification at a predetermined time. Typically, the notification informs you of an impending deadline.

- Track consumption of prepaid cases under an agreement line that covers a specific number of prepaid cases (PeopleSoft Support only).
- Cascade the case status and resolution information to child cases.
- Send notifications to agents and managers when a case is escalated.

When a user clicks the Escalate Case button on the Case page, the system displays a message. If the user clicks OK, the system saves the case and sets off one of these trigger points in AAF: *When a Support Case is Escalated* or *When a Help Desk Case is Escalated*.

The AAF decision engine also triggers these actions, whose effects are visible in the case where they are triggered:

- Suggest an action.
- Display alert messages as well as cross-sell and upsell notifications.
- Recommend a solution or a product in an upsell or cross-sell situation.
- Log entries in the Events tab of the Case History page.
- Log entries in the Events tab of the Product History page of an installed product, service, or asset.
- Log entries in the Events tab of the Change Request History page.
- Instantiate a business project.
- Update information on a Case page.
- Display a new page from a link (not available for self-service cases.)
- Display the Upsell button in the toolbar.
- Set the display template ID.

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Interactions

Interactions are records of communication between you and your customers. Interactions can be related to transactional objects such as cases, service orders, and so on. Related transactions are considered subinteractions.

You don't need to set up workflow to capture interactions. The system captures them automatically based on certain actions that you perform.

The system records inbound interactions for a case when:

- You create or access a case from the 360-Degree View page.
- You create or access a case through the CTI system.
- A customer or employee uses self-service pages to access, update, or add a case.

The system records outbound interactions for a case when:

- You create correspondence for a case.

---

**Note:** When an agent sends an email from a case to an employee, the system creates an interaction only if the employee is the customer, contact, or alternate contact for the case.

---

- You create notifications for a case.

### Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

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## Managing Basic Case Information

This section discusses how to:

- Record customer and employee information.
- Enter case information.
- Use the actions section.
- Escalate cases.
- Match cases.
- Send notifications.
- View the installed product hierarchy.
- Use entitlement matches.
- Use entitlement defaults.
- Select provider groups.
- Select workers.

---

**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

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Support Case	RC_CASE	<ul style="list-style-type: none"> <li>Support, Add Case, Case</li> <li>Support, Search Cases, Case</li> </ul>	<p>Add and manage PeopleSoft Support cases.</p> <p>You can also access the Case page in PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education from the 360-Degree View page by selecting <i>Add Case</i> from the Actions drop-down list box.</p>
HelpDesk Case	RC_CASE	<ul style="list-style-type: none"> <li>HelpDesk, Add Case, Case</li> <li>HelpDesk, Search Cases, Case</li> </ul>	Add and manage PeopleSoft HelpDesk cases.
PeopleSoft HelpDesk for Human Resources Case	RC_CASE	<ul style="list-style-type: none"> <li>HR HelpDesk, Add Case, Case</li> <li>HR HelpDesk, Search Cases, Case</li> </ul>	Add and manage PeopleSoft HelpDesk for Human Resources cases.
PeopleSoft Service Center for Higher Education Case	RC_CASE	<ul style="list-style-type: none"> <li>Analyst Service Center, Add Case, Case</li> <li>Analyst Service Center, Search Cases, Case</li> </ul>	Add and manage PeopleSoft Service Center for Higher Education cases.
Outbound Notification	RB_EM_OB_NOTIFY	Click the Notification button or Set Reminder button on the Case page (or any page with the case toolbar).	<p>Send a manual notification.</p> <p>If you have purchased PeopleSoft ERMS, you can use the Notification button on the toolbar to compose new email messages using the Outbound Notification component or respond to existing email using Email Workspace.</p> <p>The system automatically populates the contact and interested parties of the case in the recipient list on the Outbound Notification page.</p>

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Installed Product Viewable Hierarchy	RF_INSTPROD_VH_SEC	Click the View Product Hierarchy button on the Information section of the Case page. View Product Hierarchy button	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	Click the Select Agreement or Warranty link on the Case page. selecting an agreement or warranty agreement or warranty link	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 agent selects an agreement line or a warranty.
Provider Group Summary	RF_ASSIGN_PG_SEC	Click the Suggest a Provider Group button on the Case page. Suggest a Provider Group button	Select a provider group from the search result that can be assigned to the case. Groups are ranked by their fit score, an evaluation of how well each group matched the case criteria.
Candidate Summary	RF_ASSIGN_LIST_SEC	Click the Suggest an Agent button on the Case page. Suggest an Agent button	Select a worker from the search result that can be assigned to the case. Candidates are ranked by their fit score, an evaluation of how well each candidate matched the case criteria.
Match Results	RC_MATCH_RSLT_SEC	Click the Match Cases button on the Case, Solution, Summary, Notes, Tasks, Case History, Related Actions, Related Cases, or Interested Parties page. Match Cases button	View a list of matching cases based on the Case Match Definition. Where appropriate, select a related case from the match results set. When selected, the case will appear in the Related Cases grid.

## Case Page

Use the Case page (RC\_CASE) to add and manage cases.

## Navigation

- Support, Add Case, Case
- Support, Search Cases, Case
- HelpDesk, Add Case, Case
- HelpDesk, Search Cases, Case
- HR HelpDesk, Add Case, Case
- HR HelpDesk, Search Cases, Case
- Analyst Service Center, Add Case, Case
- Analyst Service Center, Search Cases, Case

## Image: Case Page

This example illustrates the fields and controls on the Case Page.

Save

Print

Copy

360

Find

Calendar

Refresh

Zoom

Fullscreen

Help

More

Personalize

Case ID 220592

Employee ID KU0010

Problem Summary Marriage checklist

Case Status Open - Research

Employee Antonio Santos

Contact Method crm\_worker\_30@ap6023fems.us.oracle.com

Case Details

Solution (0)

Case Summary

Notes (0)

Tasks (0)

Case History

Related Cases (0)

Related Actions (2)

Problem Information

\*Problem Summary

Marriage checklist

Description

Employee is getting married. Needs a checklist of HR and Payroll changes that are required and optional.

Case Information

☐ Global Case  
☐ Secured Case

\*Case Status

Open - Research

Assigned To

George DeAngelis

Case Priority

Medium

Case Severity

One Affected

Notes Summary

There are no Notes for this Case

Add Note or Attachment

Attempted Solutions

There are no attempted solutions for this Case

Related Action Summary

Personalize

Find

First

1-2 of 2

Last

Type	Summary	Status	Date Created	Added By
Solution	Go To Solution 301547 - Marriage Checklist		02/28/2013 9:56PM PST	Claudia Salinger
Solution	Go To Solution 301547 - Marriage Checklist		02/28/2013 9:56PM PST	Claudia Salinger

Human Resources

Job Data Information

Go

Benefits

Health Plans

Go

Payroll

Paycheck - US

Go

Training

Training Summary

Go

Save Case

Find Solutions

Escalate Case

Match Cases

Audit History

Created

02/28/2013 9:55PM PST

By

HHDUSA\_AGT1 Claudia Salinger

Modified

02/28/2013 9:56PM PST

By

HHDUSA\_AGT1 Claudia Salinger



## Customer Information

In PeopleSoft Support cases, this group box displays information about the customer who reported the problem. In HelpDesk and HelpDesk for Human Resources cases, this group box displays employee information. In Service Center for Higher Education, this group box displays a combination of these types of information, since such a case can be created for a company contact, consumer, or employee.

Select the Show Details link to see more information about the customer.

---

**Note:** The visibility of fields in this section depends on the Business Object Search setup, the display template that is used, and how you modify the display template.

---

These fields are used by PeopleSoft Support:

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

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

---

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

---

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

**Contact Method and Edit** Click Edit to enter the preferred method for contacting the caller.

**Reported By** Select the person who is reporting the problem.

**Site** Displays the customer site that is associated with the case. Initially, the system uses the contact's site (for this customer) as the default value. If this site doesn't exist or isn't unique, the system uses the customer's site (if unique) as the default value. The site is validated against the SIN and the Installed Product fields for the case. If you select a SIN or a product, the system enters the site that is associated with that SIN or product. If you select a site for which the current SIN or product is invalid, the system clears the SIN or product information.

**SIN (site identification number)** Displays the site identification number (SIN), which is generated for each valid site on an agreement line when the agreement line is created. The SIN identifies the agreement line, the site, and the customer, but not the contact. If you enter a SIN, you cannot also enter a PIN (personal identification number).

When you select a SIN, the system enters the associated site in the Site field. If the product is not valid for the SIN, the system clears the Product field.

**PIN (personal identification number)**

Enter a PIN to identify a customer, a representative, and an agreement.

**Region**

Displays the region that is associated with the default address.

**Customer Reference**

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

## Employee Information

Access the Employee Information section on the Case page in PeopleSoft HelpDesk for Human Resources.

In PeopleSoft HelpDesk cases, the Employee Information group box displays information about the employee who reported the problem.

If you enter information in this section to look up an employee for the case but the system cannot identify an exact match, a search page appears and you can select to create either worker or POI using the quick create function. If the search yields multiple matches, you can pick one from the search results or create a new one if deemed necessary.

---

**Note:** The visibility of the fields in this section is dependent on the display template that is used and how you modify the display template. If an agent has access to view secured data, the system displays information for the Contact Method, Edit, Phone, Email, Address, Status, and Gender fields. Secured worker information is home phone number, home email address, and home address. If the agent does not have access to view secured data, the system hides the data for these fields and the agent can only view data that is not secured.

---

These fields are used by PeopleSoft HelpDesk and HelpDesk for Human Resources:

**Employee**

Displays the worker who is experiencing the problem.

Click the name of the person to go to the Worker page, where you can change or add address, phone, and email details for the contact.

---

**Note:** When you search for an employee, you can use the Employee ID, First Name, and Last Name as search fields.

The Employee ID field uses the equals (=) operator. The other two fields use the Begins With operator. The operators are not displayed, so they aren't obvious to the user. You can, however, configure and change the default operator.

---

See "Adding and Modifying BO Search and Quick Create Definitions (*PeopleSoft CRM 9.2: Business Object Management*)".

<b>National ID</b>	Displays the ID number by which a person is identified nationally. In the U.S., it is the social security number. This field appears in PeopleSoft HelpDesk for Human Resources cases only.
<b>Alternate Contact</b>	Select an alternate contact for a case; for example, an office manager who handles calls for other employees.
<b>Contact Method and Edit</b>	Click Edit to enter the preferred method for contacting the caller.
<b>Reported By</b>	<p>Select the person who is reporting the problem.</p> <p>In cases that are crated for Higher Education, any individual may be selected for the Reported By field.</p> <p>In HelpDesk applications, existing agent-facing cases display the manager or employee who reported the problem and the employee name for whom the case was opened in the Employee field.</p> <p>In the case of the HR for HelpDesk application, you can also select POIs to report cases on behalf of employees. For example, a wife can log a case to ask about her husband's benefits plan coverage. If the search doesn't return the desired reported by person, you can create a new worker or POI on the search page using the quick create functionality.</p>
<b>Department, Location, Address, and Employee Status</b>	<p>Displays information about the worker who is experiencing the problem.</p> <hr/> <p><b>Note:</b> In the HelpDesk for Human Resources application, the Department and Location fields are display-only. You cannot change the values that the system displays in these fields. In the HelpDesk application, which is customized for IT departments, you can edit the values in the Department and Location fields. The system provides values for the Department and Location fields by default based on the worker information, provided the setID specified for these fields in the worker component matches the setID specified for the appropriate record group for the Case business unit.</p> <hr/>
<b>Gender</b>	Displays the person's gender, if known. This field appears in PeopleSoft HelpDesk for Human Resources cases only.
<b>Contact Method</b>	Click the Edit link to edit a person's preferred method of contact. A secondary page appears.
<b>Contact Type</b>	<p>Select the address, email, or phone number that you want to use on the Case page.</p> <p>To enter additional contact information that is not in the system, use the drop-down list box.</p>

For example, suppose that you need to contact the caller at a hotel phone number. You can enter the phone number here and avoid adding the hotel phone number to the caller's permanent record.

### Contact Details

Enter contact information for the contact.

### Type

Displays the contact type for existing contact methods associated with this person. If adding a temporary new contact method, the field value defaults to *For This Case Only*.

Note that any emails initiated from a case by AAF will use the contact method associated with the recipient's role, regardless of whether the case has an email contact method with the type *For This Case Only*.

## Academic Information Section

Access the Academic Information section on the Case page in PeopleSoft Service Center for Higher Education.

After identifying a constituent for a case in PeopleSoft Service Center for Higher Education, an agent will be able to view a display-only summary of the constituent's academic information.

### Institution

The academic institution associated with constituent.

### Career

The academic career of the constituent.

### Lifecycle Status

The program status ( not including recruiting status) of the constituent. If the constituent is only a suspect or prospect, this field and the other fields below it will be blank.

### Start Date

The start date for the specified combination of institution, career, program, and plan.

### Program

The academic program associated with the constituent.

### Plan

The plan within the specified program with which the constituent is associated.

### Sub Plan

The sub plan within the specified program and plan with which the constituent is associated.

## Main

### Global Case

Select this check box to identify the case as a Global Case.

### Quick Code

Select a quick code. Depending on your business rules, the quick code you select automatically populates other fields or suggests an action. If the quick code is associated with a display template ID, selecting that quick code will cause the case component to be shown using the associated display template ID.

---

**Note:** Cases retain the display template ID with which they were originally created. Therefore subsequent views of the case will be shown using the original display template for that case, not the display template associated with the quick code.

---

**Case Type**

Select the case type that best describes the part of your organization that is responsible for the problem. For example, a case can be a documentation issue, a service request, or a possible product defect.

**Case Subtype**

Select the case subtype that best describes the kind of case type selected.

**Case Status**

Select the overall status of the case. Use the different statuses to track the progression of the case. You define specific statuses for your organization.

**Provider Group**

Select the provider group to which you want to assign the case. For new cases, the default provider group (if any) depends on your business unit configuration.

When a Product Group is specified on a case, the system filters the values for product and installed product to only display the products and installed products contained within the specified product group.

See [Understanding Call Center Business Units](#) and [Understanding Display Templates](#).



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

**Assigned To**

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

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

See "Understanding Assignment Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".



Click the Suggest an Agent button to generate a ranked list of qualified, available agents on the Candidate List page, where you can select one of the suggested agents.

You must select a provider group before you can generate a candidate list.

**Product Group**

Select the product group that requires support.

This field is enabled when you first install your PeopleSoft Support application. It is applicable for all the verticals except HelpDesk for Human Resources and Government.

**Product**

Select the product that requires support.

---

**Note:** The system displays a list of products based on the option that you selected for the Product Prompt field on the Business Unit - Options page. If you selected *All*, you can select a product from the master products table. If you selected *FSI* and you have FSI installed, you can select an FSI-related product from the master FSI products table. If you selected *Installed*, you can select from a list of products that are installed at a specific site.

---

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

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

**Description**

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

**Problem Type**

Select an aspect of the product for which a call center agent might be qualified to resolve the problem. This field is related to the Product field. You must first select a product before the system displays problem type values that you can select.

If the Product field is blank, no values are available. If you use the system's auto-assignment feature, the assignment engine employs the competencies associated with the problem type to help identify the agents who are most qualified to solve the problem.

**Serial Number**

Enter the serial number of the product that requires support or servicing. If you have selected a product, the system enters the serial number for that product. If you have not selected a product, selecting a serial number enters both the product and the serial number.

If you enter a serial number directly into the Serial Number field when you first access the Case page for PeopleSoft Support and HelpDesk, the system automatically populates the Customer, Contact, Site, and Product fields on the Case page.

**Asset Tag**

Click to display the Search Installed Assets page, where you can look for installed assets by employee, department, and location.

To display this field on the Case page, access the Display Template page to select the check box for the Asset Tag field.

**Installed**

If the product that you select is registered to the employee, consumer, or customer on the Installed Products page, it displays here (PeopleSoft Support and HelpDesk only).

**Select Agreement or Warranty**

Click to search for warranties and agreement lines that might cover the case. This link is available only for open cases that are not already associated with existing agreements or warranties.

Warranties are associated with installed products and are, therefore, found only in the PeopleSoft Support application and only if you've specified an installed product with a valid warranty.

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

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

A warranty is returned in an entitlement search only if an installed product is supplied. If the entitlement search finds only one valid warranty or agreement line, the system bypasses the Entitlement Match page and displays the warranty or agreement line that was found on the case.

Once you have selected an agreement line or warranty and saved the case, the system replaces this link with a link to access entitlement details of the selected agreement line or warranty, and a link to clear the current selection on the Case page. In addition, values of these fields are no longer available for edits:

- (PeopleSoft Support) Customer, Contact, Business Unit, PIN, SIN, Site, Product Group, Product, Problem Type, and Serial Number.
- (PeopleSoft IT HelpDesk) Employee, Business Unit, Product Group, Product, and Asset Tag.
- (PeopleSoft HR HelpDesk) Employee and Business Unit.
- (PeopleSoft Higher Education) Customer, Product Group, Product, and Business Unit.

---

**Note:** Once the page is saved, you can't modify an agreement line without special administrative-level permission. If you modify the entitlements of an agreement after the agreement is already selected on the case, the new entitlements don't take effect. The PeopleSoft system provides an Application Engine program (RF\_AGR\_LEAD) to verify the entitlements that are already scheduled at the time the agreement is selected. Select Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal.

---

**Credit Authorization**

This link initiates a search of the customer's billing records for a flag indicating whether to accept the customer's payment by credit card.

**Priority**

Select the priority that classifies the case according to its effect on the caller's ability to continue operations. A problem that stops mission-critical activities has a higher priority than a problem that has a workaround or that inconveniences someone.

**Urgency**

Select the urgency of the case. As delivered, this field is visible on HelpDesk (but not Support) cases, though this may be changed by your system administrator.

**Severity**

Select the severity of the case according to its reproducibility.

**View Product Hierarchy**

Click the View Product Hierarchy button to view the installed product records that meet the caller and product criteria already entered on the Case page. The system displays the parent, child, and sibling relationships for the selected installed product records on the Installed Product Viewable Hierarchy page.

In PeopleSoft Support cases, the search is based on the customer, site, product, and serial number that have been entered.

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

**More****View Mode**

Use this field to manually change the display template that controls the appearance of the information that appears on the page.

---

**Note:** This field is delivered as hidden. If you want it to appear on the page, you must select it on the Display Template - Page Definition page.

---

When you change a display template (using AAF or manually) the system re-renders the entire page, including the toolbar, related actions, and various group boxes that appear on the pages within the Case component.



The View Mode field displays all the display templates for the component, display template family, and selected business unit. The system obtains the list of display templates from the Call Center Definition - Display Templates page. When an agent changes the business unit on the Case page, the system repopulates the display template values that appear in the drop-down list box for the View Mode field.

---

**Warning!** The display template that an agent selects using the View Mode field is temporary. This information is not stored in the Case record. Therefore, if an agent selects a display template that is not the default display template and then saves the case and comes back to it, the system displays the Case page with the default display template, not the one that the agent last used to view the case.

---

### Business Unit

Displays the business unit that is associated with the case.

Business units also control prompting for many other fields in the case. The system displays values that are valid for the business unit only. When you change the business unit, the values in this field are those for which the appropriate vertical (PeopleSoft Support or HelpDesk) is established. The system confirms that these conditions are met before the case is transferred to the business unit that you select:

- The case has no related actions or related cases.
- The current and new business units reference the same setup data (that is, they use the same setID) for these record groups: FS\_18 (items), RB\_01 (customers), RF\_07 (agreements and warranties), and RC\_02 through RC\_09 (case attributes and AAF).

### Visibility

Select the visibility of the case. The options are *Internal*, *External*, and *Internal, exclude Case Contact*.

Select the *Internal, exclude Case Contact* option to prevent self-service users from viewing the case through the self-service application.

### Resolved by First Contact

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

### Source

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

A case can also be created as a result of a personal data record change in the HCM system.

### Impact

Select from the drop-down list box a value that describes the effect that the problem has on the business processes of the organization.

<b>Asset Tag</b>	Select the asset tag of the installed product that requires support in PeopleSoft HelpDesk. If you entered a product, values are limited to asset tags for the specified product. If you have not entered a product, selecting an asset tag enters both the product and the asset tag.
<b>Installed</b>	Displays <i>Yes</i> or <i>No</i> in PeopleSoft Support and HelpDesk if the product that you select is registered to the employee, consumer, or customer on the Installed Products page.
<b>Summary</b>	Enter a summary of the problem that the caller is reporting. This field is required. If you do not enter a value, the system uses the first 80 characters of the Description field as the summary. This shortcut helps you avoid retyping the same text into two fields.
<b>Category, Specialty Type, and Details</b>	<p>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.</p> <hr/> <p><b>Note:</b> These fields can be set up to drive the case assignment process.</p> <hr/> <p>See "Understanding the Configurable Toolbar (<i>PeopleSoft CRM 9.2: Automation and Configuration Tools</i>)".</p> <p>See <a href="#">Combine Category/Type/Detail Page</a>.</p>

### Additional Fields in the Case Information Section

Use the display template to control the visibility of these fields. You can choose whether these fields appear on the Main tab or the More tab.

---

**Note:** The system updates the response met and restore met dates and times for all cases, even if the case does not have an associated agreement with an entitlement.

---

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

<b>Secured Case</b>	<p>Select to indicate to the system that the case should only be viewed by individuals associated with the provider group on the case.</p> <p>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.</p> <p>Only agents belonging to the provider group can access the case. If the agent who created the case is not a member of the provider group, that agent will not have access to the secured case.</p>
---------------------	--

**Anonymous Caller**

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

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

---

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

---

See "Creating Business Objects by Using the Quick Create Component (*PeopleSoft CRM 9.2: Business Object Management*)".

**Site without Customer**

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

**Remote Case/Issue ID**

The unique keys of the case in the third-party system from which the case was passed to PeopleSoft Call Center applications. This option is used to map the case created in CRM to its counterpart stored in a third-party system.

**Purchased From**

Enter the name of the vendor from whom the customer acquired the product or service that is referenced in the case.

**Target Close Date**

Enter the desired date of resolution for the problem.

**Error Code and Error Message**

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

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

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

**Response Met**

Displays the date and time that the problem was fixed or the service was restored.

**Restore Met**

Displays the date and time the agent or service person restored service or fixed the problem with the product.

<b>Entitled Response</b>	Displays the date and time that the customer or employee is entitled to a response after they call in a problem.
<b>Actual Response</b>	Displays the date and time that the agent or service person actually responded to the caller's problem.
<b>Entitled Restore</b>	Displays the date and time that the caller is entitled to have their problem or service restored.
<b>Red Restore and Yellow Restore</b>	<p>Displays the date and time that the problem or service will turn red or yellow if it is not restored. These fields are used in conjunction with agreements.</p> <p>To use these fields, you must enter a percent in the Percent of SLA for Red and Percent of SLA for Yellow fields on the Business Unit-Options page.</p>
<b>Actual Restore</b>	Displays the date and time that the service or problem was actually fixed or restored.
<b>Survey Score</b>	<p>Displays the score generated by the survey that was sent to the customer. This field does not appear on the page unless you enable it using the Display Template - Page Definition page. You must also sign in as a user that has permission to view this field; otherwise it does not appear on the page.</p> <p>The Survey Score field uses the RC_VIEW_SURVEY_SCORE functional option code, the RC_VIEW_SURVEY_SCORE_GROUP functional option group code, and the Case Survey Score application security profile to enforce security. The PeopleSoft system delivers the functional option code for the Survey Score field on the Display Template - Page Definition page. It also delivers the Case Survey Score membership list, which is where you can control what roles or users are permitted to view the Survey Score once it is enabled on the Display Template - Page Definition page. For this membership list, the PeopleSoft system delivers the <i>Call Center Manager</i> and <i>Help Desk Manager</i> roles.</p>

---

**Note:** The Survey email is sent to Customer's primary email address. If the customer is a consumer, then the survey email is sent to the consumer's primary email address. If the customer is a company, then the survey email is sent to the contact's primary email address.

On the Case page, an agent can edit the Contact Method field to enter an email with the *For This Case Only* type, which can be different from the customer's primary email. In that scenario, the survey email is still sent to customer's primary email address and not to the email address with the *For This Case Only* type. Using AAF policies, you can instruct the system to send out a survey when a case is in the Closed - Resolved status. In this type of policy setup, administrators can specify who to notify if an error occurs while sending out a survey. The two options are: Notify a Role and Notify a User. If the notify role option is selected and an error occurs, then all users having the specified role receive an email notification. If the user option is selected, then only that user will receive the email about the error.

---

See "Understanding PeopleSoft CRM Security (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

**Escalation Date Time and Escalation Count** These fields display the date and time an escalation was initiated and the number of times the case was escalated. These fields are hidden when you first install your call center applications.

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

See [Understanding Assignment Options](#).

Enter information about the case in the following fields:

## Actions

Access the Actions section on the Case page.

The Action Link Groups that you or your implementation team set up during installation appear in the Related Actions group box on the Case page. You can set up links in the Related Actions drop-down list box to create service orders and defects and to look for offers and promotions.

When the system loads the items in the Related Actions drop-down list box, it checks to see if the link definition is setID enabled. If it is, then the setID of the link definition is matched with the setID of the case, which is obtained from Case business unit. If the two setIDs do not match, then the system does not populate that link definition in the drop-down list box. When the Case page is loaded and the user changes the business unit, the system reloads the items in the Actions drop-down list box.

In PeopleSoft HelpDesk for Human Resources, you can link to pages in the PeopleSoft or E-Business HCM database (depending on which one your system is integrated with).

In PeopleSoft Service Center for Higher Education, you can link to pages in the PeopleSoft Campus Solutions application.

PeopleSoft Support, HelpDesk, and Service Center for Higher Education applications offer the capability to link to predefined actions from the Case page. You can execute actions on the Actions section of the Case Page, the Summary page, or the Related Actions page.

Note that in Service Center for Higher Education, some listed actions may not be applicable for all roles (constituent, company contact, or worker). If an action is attempted for someone who does not have a role that permits that action, an error message will be displayed to inform the user that the action is not available.

See [Managing Related Actions](#).

The PeopleSoft system delivers these predefined actions:

- *Asset Administrator*
- *Asset Summary*
- *Branch Script*
- *Business Project*
- *Case Survey*
- *Change Request - Create New*
- *Change Request - Relate*
- *Create RMA*
- *Defect - Create New*
- *Defect - Relate Existing*
- *Offer History*
- *Sales Lead*
- *Sales Order*
- *Service Order*
- *Remote Control*
- *Software Delivery*
- *Work Order - Create New*

---

**Note:** To create a related action to the Offer Presentation page in PeopleSoft Order Capture, you must set up the link using the Link Group pages. To display the Get Offers or Promotions icon, you must set it up using an AAF policy.

---

See [Understanding Link Setup](#).

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Suggest Action

The system automatically displays a suggested action that the agent can perform. This suggestion is driven by policies that you set up in AAF.

See "Configure Call Center Suggested Action Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Links

The system displays a category name (for example, *Human Resources*, *Benefits*, *Related Actions*) for specific links in a category and a Go button.

Depending on the security established for the links that are set up as content references (CREFs), an agent can view all links or a subset of the links. Note that only permission list security definitions from the content reference will be used for determining link visibility. If the user does not have access to any links in a category, the category does not appear.

### Go

Click this button after selecting a link in a category to access the corresponding component (specified as a link).

When you click Go, the system:

- Opens a new browser window with the target page (optional).
- Enters the link's long description in the Related Actions section.

---

**Note:** The PeopleSoft system includes links to Base Benefits and Benefits Administration enrollment functionality in PeopleSoft Capital Management (PeopleSoft HCM). Enrollment in medical and FSA (flexible spending accounts) plans under the COBRA (Consolidated Omnibus Budget Reconciliation Act) provisions is carried out in a different manner within PeopleSoft HCM. To access the enrollment pages for medical and FSA plans under COBRA, log on directly to your PeopleSoft HCM system.

---

See *PeopleSoft HCM: Application Fundamentals*.

See *PeopleSoft HCM: Benefits Administration*.

## Related Links

[Case Creation](#)

[Understanding Call Center Prompt Tables](#)

[Validating Errors Reported by Callers](#)

"Understanding Installed Products (*PeopleSoft CRM 9.2: Product and Item Management*)"

"Understanding Business Project Tracking (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

[Understanding Link Setup](#)

[Setting Up Content References](#)

## Escalating Cases

Access the Case page.

Use the Escalate Case button to send notifications to agents and managers. If you have associated an AAF trigger point with the button, the system displays a message when a user clicks the Escalate Case button.

---

**Note:** The PeopleSoft system does not deliver the Escalate Case button with any associated trigger points. You must use the functionality within AAF to activate this button before you implement your PeopleSoft call center applications.

---

When the user clicks OK, the system increments the escalation count, saves the escalation date and time, saves the case, and sets off one of these trigger points in AAF:

- When a Support Case is Escalated
- When a Help Desk Case is Escalated

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Match Results Page

Use the Match Results page (RC\_MATCH\_RSLT\_SEC) to view a list of matching cases based on the Case Match Definition.

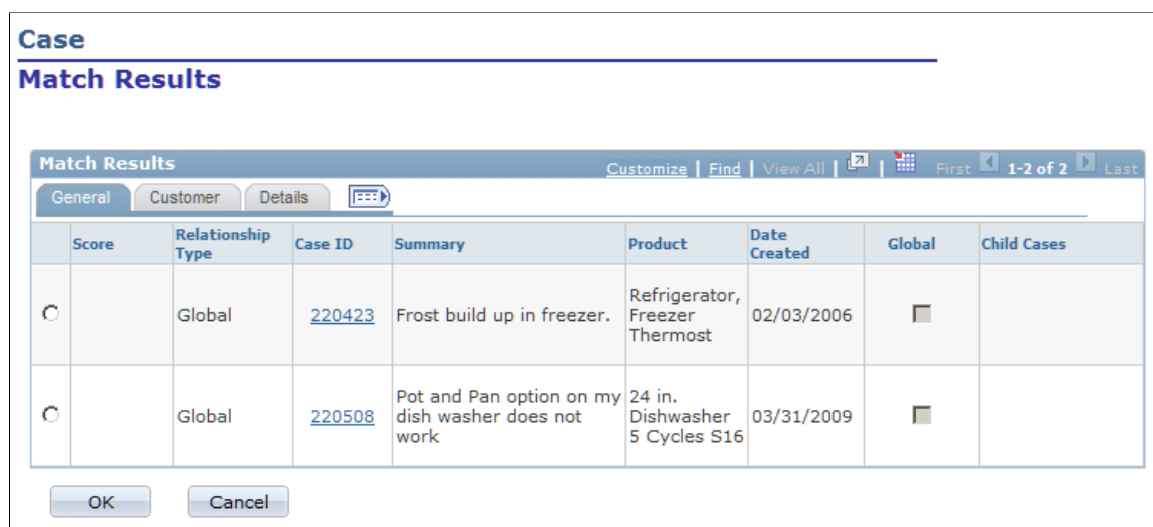
Where appropriate, select a related case from the match results set. When selected, the case will appear in the Related Cases grid.

### Navigation

Click the Match Cases button on the Case, Solution, Summary, Notes, Tasks, Case History, Related Actions, Related Cases, or Interested Parties page. Match Cases button

### Image: Match Results page

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



**Case**

**Match Results**

Match Results Customize Find View All First 1-2 of 2 Last

General Customer Details

Score	Relationship Type	Case ID	Summary	Product	Date Created	Global	Child Cases
	Global	<a href="#">220423</a>	Frost build up in freezer.	Refrigerator, Freezer Thermost	02/03/2006	<input type="checkbox"/>	
	Global	<a href="#">220508</a>	Pot and Pan option on my dish washer does not work	24 in. Dishwasher 5 Cycles S16	03/31/2009	<input type="checkbox"/>	

OK Cancel



The Match Cases page enables you to see any existing cases that match the current case. This lets you see if the current issue has already been recorded in another case. Any cases that match the current case will be displayed.

**Score**

Displays a rating between 1 and 100 that represents how closely the entry matches the search criteria. This field is only displayed if keyword searching is enabled.

---

**Note:** Keyword searching is enabled or disabled on the Match Detail page.

---

**Relationship Type**

Describes the type of relationship that will apply if you associate the case from this grid row with the current case.

**Case ID**

Identifies cases which match the current case.

---

**Note:** Case matching criteria are defined on the Match Detail page.

---

**OK button**

Click this button to associate the current case with the case on the selected grid row. The two cases will be associated with the relationship indicated on the selected grid row.

Note that the system will also automatically make the following updates:

- If the relationship type for the selected case has the Set Parent as Global Case check box selected, the system will automatically select and update the Global Case check box for that case.
- If the relationship type for the selected case has the Set Status of Child Using Duplicate Case Status check box selected, the system will automatically update the status of the current case to the Duplicate Case Status defined on Business Unit Case Default page.

---

**Note:** If no existing cases meet the match criteria, the Match Results page will be displayed with a message indicating that no matches were found.

If case matching is not enabled for the business unit of the current case, the Match Results page will be displayed with a message indicating that no match criteria have been defined for this business unit.

---

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

See [Defining Call Center Business Units](#).

## Outbound Notification Page

Use the Outbound Notification page (RB\_EM\_OB\_NOTIFY) to send a manual notification.

## Navigation

Click the Notification button or Set Reminder button on the Case page (or any page with the case toolbar).sending notifications, warning Notification button Set Reminder button

The Outbound Notification page behaves slightly different if the Set Reminder toolbar button is clicked to access the page as opposed to the Notification button:

- The Send and Send and Solve Case toolbar buttons are unavailable.
- The system makes the sender of the notification the TO recipient of the notification.

See "Sending Manual Notifications From CRM Transactions (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Installed Product Viewable Hierarchy Page

Use the Installed Product Viewable Hierarchy page (RF\_INSTPROD\_VH\_SEC) to view the installed products that meet the criteria available on the Case page.

For the installed products that the system returns, the page displays parent, child, and sibling relationships to other installed products.

### Navigation

Click the View Product Hierarchy button on the Information section of the Case page.View Product Hierarchy button

For more information about viewing the installed product hierarchy, see "Understanding Installed Products (*PeopleSoft CRM 9.2: Product and Item Management*)".

## Entitlement Match Page

Use the Entitlement Match page (RF\_ENTL\_LIST\_SEC) to select from a list of warranties or agreement lines that may cover the case.

### Navigation

Click the Select Agreement or Warranty link on the Case page.selecting an agreement or warranty agreement or warranty link

For more information about using entitlement matches, see "Understanding Entitlement Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Entitlement Details Page

Use the Entitlement Details page (RF\_VIEW\_ENTL\_SEC) to view the entitlements associated with a case.

This link is available after an agent selects an agreement line or a warranty.

### Navigation

Click the available warranty or agreement line link on the Case page.

For more information about using entitlement defaults, see "Understanding Agreements and Warranties (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Provider Group Summary Page

Use the Provider Group Summary page (RF\_ASSIGN\_PG\_SEC) to select a provider group from the search result that can be assigned to the case.

Groups are ranked by their fit score, an evaluation of how well each group matched the case criteria.

### Navigation

Click the Suggest a Provider Group button on the Case page. Suggest a Provider Group button

For more information about selecting provide groups, see "Understanding Assignment Searches (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Candidate Summary Page

Use the Candidate Summary page (RF\_ASSIGN\_LIST\_SEC) to select a worker from the search result that can be assigned to the case.

Candidates are ranked by their fit score, an evaluation of how well each candidate matched the case criteria.

### Navigation

Click the Suggest an Agent button on the Case page. Suggest an Agent button

For more information about selecting workers, see "Understanding Workers in CRM (*PeopleSoft CRM 9.2: Business Object Management*)".

---

## Validating Errors Reported by Callers

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

The Validate button is delivered hidden. If you want to validate errors reported by callers, modify the display template to enable the links.

## Page Used to Validate Errors

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Error Validation	RC_CASE_ERROR	Click the Validate button within the Case Information group box on the Case page.	Search for existing errors or create new errors. Use this page when an error on a case does not have an unambiguous match in the error table. The error code elements are visible only if you have enabled the error code tracking for the business unit with which you are working.

## Error Message Validation

When you support products such as software or electronics that provide users with diagnostic error messages, looking up frequently used solutions using the error message is an efficient way to resolve cases.

You record error information on the Case page. The system does not force you to select from known error messages. Instead, you can enter whatever error information the caller provides. The appearance of this button is activated in the Display Template Details page. If it is activated in the display template, the button appears on the page. If it isn't activated in the display template, then the system does not display it.

When you enter an error code, the system goes through the following process to ensure that a corresponding entry appears in the Error table (ERROR\_MESS\_TBL):

1. The system checks whether the data that you entered is an unambiguous match for a single known error.

If a match is found, the system associates the case with the known error.

An unambiguous match is not necessarily an exact match. For example, if the case does not specify the error code but it has a message that is an exact match for a known message, then the system considers the match an unambiguous match. However, an error code alone is never sufficient for an unambiguous match because different products might use the same code for different purposes.

2. If no unambiguous match is established, you can click the Validate button to access the Error Validation page.

From this page, you can:

- Search for similar errors.

If you find and select an error, the system associates the case with that error. The search is a keyword search, so it does not require an exact match—a close match suffices. This search helps you find the error even if you don't type the full text of the error message or if you have typographical errors in your data.

- Create a new error record using the error code and error message that you entered on the Case page.

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

## Error Validation Page

Use the Error Validation page (RC\_CASE\_ERROR) to search for existing errors or create new errors.

Use this page when an error on a case does not have an unambiguous match in the error table. The error code elements are visible only if you have enabled the error code tracking for the business unit with which you are working.

### Navigation

Click the Validate button within the Case Information group box on the Case page.

### Image: Error Validation page

This example illustrates the fields and controls on the Error Validation page.

The screenshot displays the 'Error Validation' page within a case management system. At the top, the 'Case' header is visible. Below it, the 'Error Validation' section contains case details: Case ID (New), Customer (MD Engineering), Summary (Router fails frequently), Open Cases (0), Status (Open - New Case), Contact (Sujay Bandy), Contact Method (800/222-7000(334)), and Customer Value (Gold ★★★★★). A navigation bar includes links like Save, Print, Spell Check, 360-Degree View, 360-Degree Search, and Personalize. Below the navigation bar, there are tabs for Tasks (0), Case History, Related Cases (0), Related Actions (0), Interested Parties (0), and Case Error. The 'Case Error Information' section features input fields for 'Error Code' (RTR-00834) and 'Error Message' (RTR-00834: Unable to retrieve all packets). Below these fields are buttons for 'Search', 'Create New Error', and a link 'Return to Case'. A message at the bottom states: 'We are unable to find a match for the supplied Error. Please refine your search and try again, or create a new error.'

### Error Code and Error Message

Displays the error code and error message that are prepopulated using the data from the Case page.

### Search

Click to search for existing errors.

### Create New Error

Click to create a new error record using the error code and message on the Error Validation page. If you changed the information on this page, the system updates the error code and message on the Case page to reflect the change.

When you create a new error, the system associates the underlying case with the system-generated ID that is assigned to the error. The presence of an error ID on the case record indicates that the error has been validated.

**Return to Case**

Click to leave the page without validating the error. As long as the error remains unvalidated, the Validate button on the Case page remains available.

---

## Integrating with Third-Party Asset Management Applications

PeopleSoft HelpDesk gives IT support personnel the ability to pass case information to a third-party asset management application in the performance of asset management tasks. Assets can be any network-connected device, such as a computer, peripheral, or router.

PeopleSoft HelpDesk provides the framework to launch the third-party application from the case toolbar and from the Related Actions sections. PeopleSoft HelpDesk has two toolbar buttons—one for Asset Discovery and one for Remote Control. These buttons launch a third-party asset management application and pass information specific to the case to the third-party applications. The information from the case is passed in the URL. Case information that is passed is typically a person or asset ID, such as employee ID number or the asset tag.

The system captures the date and time when an agent launches the asset management application on the Related Actions page.

To set up case information transfer:

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

# Creating Cases Automatically For HCM Updates

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## Understanding Automatic Case Creation For HCM Updates

This section discusses the following:

- Case creation for HCM self-service transaction updates.
- Active Analytics Framework setup for automatic case creation.
- Quick codes and EIP information.
- Create Case EIP.

### Creating Case for HCM Self-Service Transaction Updates

PeopleSoft CRM HelpDesk for Human Resources provides the ability to automatically create cases for personal and job data updates that are made through transactions in HCM.

For example, an employee signs into the self-service application and submits a name change request after getting married. Submission of this request triggers the system to evaluate if the update warrants the creation of an HR HelpDesk case and if the answer is yes, a message is sent to the integrated CRM system, and subsequently, CRM system creates an HR HelpDesk case for the name change. The case then gets assigned, worked on and resolved, based on how the existing case management process is defined.

---

**Note:** Automatic case creation is not applicable for updates made for Persons of interest (POIs). That is, when you submit a name change or job relocation request through self-service transactions for a POI, it will not automatically create an HR HelpDesk case.

---

### Active Analytics Framework (AAF) Setup for Automatic Case Creation

The automatic case creation feature leverages AAF setup components to build policies that specify the conditions (the types of HCM data updates) for which the system needs to create HR HelpDesk cases automatically. The system delivers trigger points, policies, actions, and other setup components for use in this feature.

When an employee updates their personal data or job data in HCM at runtime, AAF invokes the corresponding trigger point and evaluates the policy that is associated with the trigger point. If all conditions of the policy are evaluated to true based on the runtime scenario, it executes the Create Case action of the policy.

The Create Case action publishes information that is needed to create the case from HCM to CRM through an Enterprise Integration Point (EIP). When CRM receives the message, it takes the information

from the message and uses the agent-facing RC\_CASE\_CI component interface to create the HR HelpDesk case for the data update in HCM.

**Note:** PeopleSoft delivers the Active Analytics Framework, trigger points and policies as disabled; make sure you enable them to use the AAF setup.

<b>AAF Component</b>	<b>Delivered Value</b>
Trigger Point	<p>The following trigger points invoked from the component PostSaveChange event:</p> <ul style="list-style-type: none"> <li>• After the Person Data is Updated.</li> <li>• After the Job Data is Updated.</li> </ul>
Policy	<p>Following policies available for the <i>SHARE</i> setID.</p> <ul style="list-style-type: none"> <li>• Name is Changed: Condition: If first or last name is changed, and regulatory region is USA.</li> <li>• HRHD: Job Location is changed Condition: If location is changed, and the business unit is <i>Global Business Institute BU</i>, and HR status is <i>Active</i>.</li> <li>• HRHD: Early Retirement Requested Condition: If action is <i>Retirement</i>, and reason is <i>Early Retirement</i>, and HR status is <i>Active</i>.</li> </ul> <hr/> <p><b>Note:</b> The policies mentioned here are examples of the system-delivered policies. You can modify the existing policies, or create new ones as per your requirements.</p> <hr/>
Action	<p>Create Case in CRM</p> <p>This action sends the information collected on the action configuration page in AAF to CRM in the form of EIP messages. See <a href="#">Create Case EIP</a>.</p>
Term	<p>Several terms are available in the following subject areas:</p> <ul style="list-style-type: none"> <li>• Job data</li> <li>• Person data</li> </ul> <hr/> <p><b>Note:</b> You can create new terms as per your requirements.</p> <hr/>

## Quick Codes and EIP Information for Automatic Case Creation

To build an AAF policy in HCM, the administrators need to refer to the CRM quick codes. To ensure that the quick codes are present in HCM, we need to publish the quick codes from CRM and this is done using EIPs. The EIP publishes the following quick code field values:

- Business Unit



- Quick Code
- Effective Date
- Status as of Effective Date
- Description (quick code)
- Summary
- Case Status
- Overwrite
- Problem Description

For publishing quick codes from CRM to HCM as part of automatic case creation, CRM uses two asynchronous one-way EIPs:

- **HD\_QUICK\_CODE\_FULLSYNC**: You need to invoke the publish process in the Full Data Publish utility of Enterprise Components for initial full synchronization.
- **HD\_QUICK\_CODE\_SYNC**: Publishes the incremental synchronization when a quick code is added or modified.

Ideally, during the initial setup, you need to use the full synchronization EIP(**HD\_QUICK\_CODE\_FULLSYNC**) to export all CRM quick codes to the HCM system. Once you export all quick codes, turn off this EIP. Later on, whenever you want to export the newly created or modified quick codes, use the incremental synchronization EIP(**HD\_QUICK\_CODE\_SYNC**). If you think the codes are corrupted in HCM, you need to run the quick code full synchronization, as the EIP removes all existing quick codes from HCM and reloads it from CRM.

---

**Note:** Subsequent quick code changes while you synchronize to HCM do not get reflected in the existing AAF polices in HCM. However, while processing the Create Case EIP messages in CRM, the system will always use the latest version of quick codes.

---

For more information on how to publish the quick codes from CRM to HCM, see [Publishing quick codes from CRM to HCM](#)

## Create Case EIP

When the Create Case action is invoked in AAF, it publishes a one-way, asynchronous EIP (**HD\_HRHD\_CASE**) message from HCM to CRM. The message contains information that CRM uses to create HR HelpDesk cases and pre-populate them with default values using the agent facing component interface (**RC\_CASE\_CI**).

The case-related information includes:

- Employee ID (for whom the case is created)
- Employee Referral ID (by whom the case is created)
- Business Unit
- Quick Code

- Problem Description

For each Create Case EIP message it receives, CRM uses the business unit and the quick code from the message to derive the rest of the default values that need to be populated to a case.

### Case Problem Description

The CRM system obtains default values for case problem description from two sources: the quick code definition and the EIP message (which originates from the AAF action). It then evaluates the following conditions and decide which one to use for a case:

- If the Overwrite option of the (problem) Description field is enabled in the associated quick code definition, system uses the quick code problem description. If the Overwrite option is disabled, the problem description from the EIP message is used instead.
- If problem descriptions from both sources (quick code and EIP message) are unavailable, the problem summary text from the quick code definition is used as the problem description of the case.
- If problem summary is unavailable from the quick code definition, the first 80 characters of the problem description is used as the problem summary of the case.

### Case Visibility

By default, the visibility of cases created for HCM data update is set to *Internal*.

### Case Source

The CRM system populates the Source HCM field value as the default source of cases created for the HCM data update.

---

## Setting Up Automatic Case Creation

We deliver the CRM system with the automatic case creation facility disabled. To enable the automatic creation of cases in CRM when a person updates his or her personal or job data in HCM, follow the steps below:

1. Configure the default HCM source value that you should populate in the cases.
2. Set up the Integration Broker to execute the Create Case and Quick Code EIPs.
3. Publish the quick codes from CRM to HCM using EIPs for an initial full synchronization.
4. Enable case creation in HCM installation table.
5. Configure AAF policies that decide when you need to initiate automatic case creation.

## Configuring the Default HCM Source Value

Use the Case Defaults page to configure a default case source for the business unit for which you want to enable the automatic case creation.

For example, if you are enabling automatic case creation for the business unit *HRHDU*, edit the record for HRHDU business unit to set the value of Source HCM field to HCM HR HelpDesk

## Navigation

Set up CRM, Business Unit Related, Call Center Definition, Case Defaults

### Image: Case Defaults page

This example illustrates the fields and controls on the Case Defaults page. You can find definitions for the fields and controls later on this page.

## Setting Up Integration Broker

Follow the steps below to set up the Integration Broker for automatic case creation:

1. Edit the *CASE\_EIP* queue to set the Queue Status to *Run* in both HCM and CRM systems.
2. Check if the Domain Status is set to *Active* in HCM and CRM systems.
3. In HCM, check the following settings against the remote node *PS CRM - Local Node*:
  - If PSFT\_CR is not the PS CRM local node in the system, rename the PSFT\_CR node to match the name of the existing CRM local node.

- In the Authentication Option field, select *Password*. Also ensure that the node password is the same as the one used in the local node. E.g.: PSOFT.
  - In the Default User ID field, select the HRHD Administrator role.
4. In HCM, check the following settings against the local node in the system:
    - In the Authentication Option field, select *Password*.
    - Make sure that the node password is the same as the one used in the remote node. E.g.: PSOFT.
  5. In HCM, add the remote node (the CRM node) to the LOCAL gateway and make sure that you are able to ping the node successfully. Repeat this step in CRM to add the remote node (the HCM node) to the LOCAL gateway, and ping the node.
  6. In CRM, check the following settings against the remote node *PS HRMS - Local Node*:
    - If PSFT\_HR is not the PS HRMS local node in the system, rename the PSFT\_HR node to match the name of the existing HCM local node.
    - In the Authentication Option field, select *Password*. Also ensure that the node password is the same as the one used in the local node. E.g.: PSOFT.
    - In the Default User ID field, select the HRHD Self Service role.
  7. In CRM, check the following settings against the local node in the system:
    - In the Authentication Optionfield, select *Password*.
    - Make sure that the node password is the same as the one used in the remote node. E.g.: PSOFT.

---

**Note:** To read more about the Integration Broker setup, see the product documentation for *PeopleTools: PeopleSoft Integration Broker* and *PeopleTools: PeopleSoft Integration Broker Administration*.

---

## Publishing quick codes from CRM to HCM

To publish quick codes from CRM to HCM for automatic case creation, system uses two asynchronous one-way EIPs:

- **HD\_QUICK\_CODE\_FULLSYNC:** You need to Invoke the publish process in the Full Data Publish utility of Enterprise Components for initial full synchronization.
- **HD\_QUICK\_CODE\_SYNC:** The incremental synchronization is published automatically when a Quick Code is added or modified.

Ideally, during the initial setup, you need to use the full synchronization EIP(**HD\_QUICK\_CODE\_FULLSYNC**) to export all CRM quick codes to the HCM system. Once you export all quick codes, turn off this EIP. Later on, whenever you want to export the newly created or modified quick codes, use the incremental synchronization EIP(**HD\_QUICK\_CODE\_SYNC**). If you think the codes are corrupted in HCM, you need to run the quick code full synchronization, as the EIP removes all existing quick codes from HCM and reloads it from CRM.

## Initial Full Synchronization

Follow the procedure below to publish the quick codes from CRM to HCM:

1. Log on to CRM as an administrator user.
2. Access the Full Data Publish Rules page and edit the full data publish rule configured for the *HD\_QUICK\_CODE\_FULLSYNC* service operation and make the changes listed below:
  - Enter *HD\_QUICK\_CODE\_FULLSYNC* in the Publish Rule ID and Description fields.
  - Select *Active* in the Status field.
  - Clear the Create Message Reader and Create Message Trailer check boxes.

### Navigation

Enterprise Components, Integration Definitions, Full Data Publish Rules

### Image: Full Data Publish Rules page

This example illustrates the Full data publish rules configuration for automatic case creation.

The screenshot shows the 'Full Table Publish Rules' configuration page. At the top, there are three tabs: 'Full Table Publish Rules' (selected), 'Record Mapping', and 'Languages'. Below the tabs, the 'Service Operation' is 'HD\_QUICK\_CODE\_FULLSYNC' and the 'Operation Description' is 'Quick Code Full Sync'. The 'Message.Version' is 'HD\_QUICK\_CODE\_FULLSYNC'. The 'Publish Rule Definition' section includes fields for '\*Publish Rule ID' (HD\_QUICK\_CODE\_FULLSYNC), '\*Description' (HD\_QUICK\_CODE\_FULLSYNC), and '\*Status' (Active). There are also fields for 'Chunking Rule ID' and 'Chunk Table'. Below these fields are two sections: 'Message Options' with checkboxes for 'Create Message Header' and 'Create Message Trailer' (both unchecked), and 'Output Format' with radio buttons for 'Message' (selected), 'Flat File', and 'Flat File with Control Record'.

3. Click the Languages tab of the Full Data Publish Rules page and select the following check boxes:
  - Publish All Related Languages

- Publish Base Language

**Image: Full Data Publish Rules - Languages page**

This example illustrates the Full data publish rules - Languages configuration for automatic case creation.

The screenshot displays the 'Full Data Publish Rules - Languages' configuration page. The 'Languages' tab is selected. The table shows a single entry for 'HD\_QUICK\_CODE\_FULLSYNC' with the description 'Quick Code Full Sync'. Below the table, the 'Publish Rule Definition' section is visible, showing the rule ID and description both set to 'HD\_QUICK\_CODE\_FULLSYNC'. At the bottom, the checkboxes for 'Publish All Related Languages' and 'Publish Base Language' are both checked.

4. Access the Full Data Publish page and add a new run control for the HD\_QUICK\_CODE\_FULLSYNC service operation.
  - Enter an identifier in the Request ID field.
  - Select *Once* in the Process Frequency check box.
  - Search and select *HD\_QUICK\_CODE\_FULLSYNC* in the Service Operation field.

## Navigation

Enterprise Components, Integration Definitions, Initiate Processes, Full Data Publish

### Image: Full Data Publish page

This example illustrates the Full Data Publish page.

5. Click the Run button and check the Process Monitor to see if the Full Data Publish process (EOP\_PUBLISHT) is completed successfully.

## Subsequent Incremental Synchronization

Follow the steps below to publish the newly added quick codes to HCM:

1. Log on to CRM as an administrator user.
2. Access the Quick Code page and search for a quick code with *HRH DU* in the Business Unit field.

## Navigation

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

3. Update one of the existing quick code, or create a new quick code and save the changes.

## Verify the New Quick Codes

1. Log on to HCM as an HRHD Administrator user.
2. Open the AAF policy for the automatic case creation in design mode.

## Navigation

Enterprise Components, Active Analytics Framework, Policies, Manage Policies

- Click the Edit Actions button in the Actions section. This opens up the Edit Actions page.

### Image: Build a Policy - Edit Actions page

This example illustrates configuring the actions on the Edit Actions page.

Build a Policy

Edit Actions

Policy

Name
HRHD: Name is changed
Status
In Design

Description
Name is changed for employee in a Regulatory Region.

Conditions

Person Name is changed  
And Regulatory Region equals United States

Actions

1

Action Type
HHD - Create Cases

Action Name
Create a Case

Status
Active

Action Objective

First
1 of 1
Last

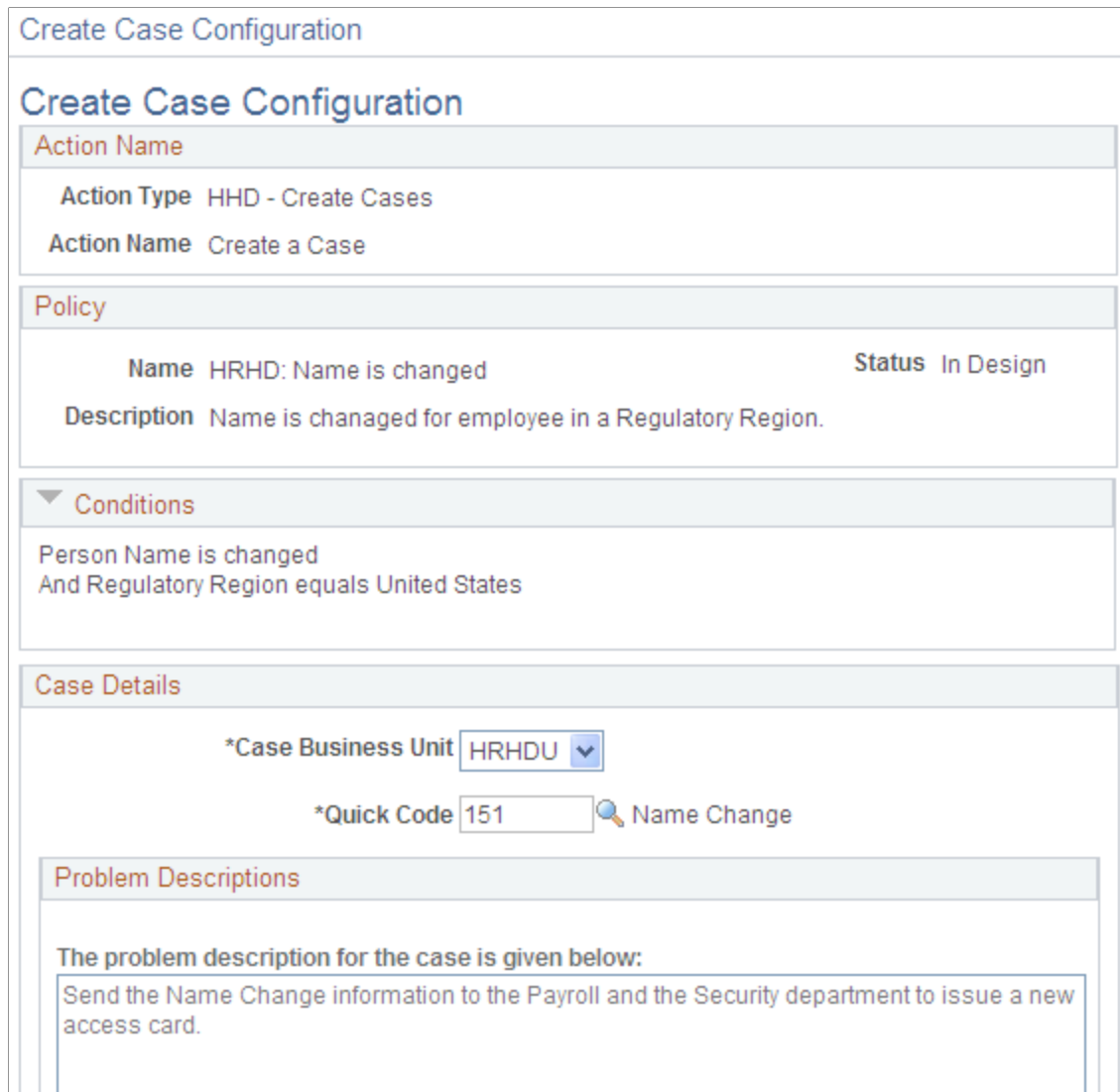
Configure



- On the Edit Actions page, click the Configure button in the Actions section. This opens the Create Case Configuration page.

**Image: Create Case Configuration page**

This example illustrates the Create Case Configuration page. You can search and select quick codes on this page.



**Create Case Configuration**

**Create Case Configuration**

**Action Name**

Action Type HHD - Create Cases

Action Name Create a Case

**Policy**

Name HRHD: Name is changed Status In Design

Description Name is changed for employee in a Regulatory Region.

**Conditions**

Person Name is changed  
And Regulatory Region equals United States

**Case Details**

\*Case Business Unit HRH DU

\*Quick Code 151 Name Change

**Problem Descriptions**

The problem description for the case is given below:

Send the Name Change information to the Payroll and the Security department to issue a new access card.

- Select *HRH DU* in the Case Business Unit field and search for quick codes in the Quick Code field. Verify whether all configured quick codes in CRM are listed.

## Verifying the Configuration for Automatic Case Creation

To verify the automatic case creation setup, follow the steps below:

- Log on to the HCM system as an HRHD Administrator user.
- Access the Build a Policy page and activate the AAF setup for the feature. This involves checking if the policies and the triggers are enabled. You should also turn ON the AAF setting Enable Runtime to enable case creation.

3. Open the policy in Edit mode and modify either the case business unit or the quick code used for creating cases and save the changes. Make sure that the policy is activated.
4. Access the Workflow Configurations page and make sure that the Allow DB Update option is selected for the required self service transactions. E.g.: Name Change.
5. At runtime, access the Name Change self service transaction and change a person's last name in HCM. Submit the request. This event triggers the AAF policy created for name change.
6. The system publishes the case related information to CRM and creates an HR HelpDesk case through the Create Case EIP (HD\_HRHD\_CASE). Verify that the new case is created for the right employee (for whom the HR data was updated) and displays the correct default values (as selected in the policy action).

## Troubleshooting Integration Issues

A list of common issues seen during automatic case creation, and their possible resolutions are listed below:

<b>Issue</b>	<b>Solution</b>
Unable to view transaction details; links on the Integration Broker Monitor are disabled.	To view transaction details on the monitor, the logged on user needs to be associated with a role that has the HRHD EIP service permission. E.g.: HRHD Administrator.
The transaction status of the service operation stays at New and would not update.	Make sure that the domain status is set to <i>Active</i> and the channel status for HDHR EIP services is set to <i>RUN</i> .
Unable to ping the remote node successfully and receives this error: "Asynchronous Message Handler: Access denied. Target and source message node passwords do not match."	Use the same password for both local and remote nodes in CRM and HCM. E.g.: PSOFT
Receives the following error while publishing EIP message: "PublicationContractManager::ProcessError/RetryResponse(): 'PSFT Authentication token failed for Node <local node name>. (158,454)'"	Use <i>Password</i> as the authentication option for local and remote nodes in both systems.
Receives error regarding Integration Broker Authentication: No node Authentication Option set for node <remove node name> on Target system.	Make sure that the remote node name on the local system is the same as the local node name on the remote system.
Receives error "PublicationContractManager::ProcessError/RetryResponse(): 'User XXX not authorized to invoke Service Operation HD_XXXXXXX. (158,536)'"	Make sure user XXX has the HRHD Administrator role in the target system.
No transaction was created in the Integration Broker Monitor after the EIP message for quick codes was supposed to be published.	Make sure that when the quick code sync process is set to run on the Full Data Publish page, the process frequency is set to <i>Once</i> .

## Troubleshooting Quick Codes Issues

If the newly created quick codes are not displayed as expected in HCM, follow the steps below to see if the issue is EIP-related:

1. Log on to CRM and check the Process Monitor component of Process Scheduler to see if the process *EOP\_PUBLISHT* is running successfully.

**Navigation**

PeopleTools, Process Scheduler, Process Monitor

2. Access the Monitor Overview page and check if the Integration Broker request result for full sync (HD\_QUICK\_CODE\_FULLSYNC) or incremental sync (HD\_QUICK\_CODE\_SYNC) is *Done*.

**Navigation**

PeopleTools, Integration Broker, Service Operations Monitor, Monitoring, Asynchronous Services

3. Access the Operation Instances page to check if the Transaction Status of the service operation (HD\_QUICK\_CODE\_FULLSYNC or HD\_QUICK\_CODE\_SYNC) is *Done*.
4. If the process results in an error, click the Error link to get the error details

---

**Note:** If the above steps were completed without errors, it means that there are no issues with Integration Broker connectivity from the CRM side. You need to repeat the same steps in HCM also. Log on to HCM as an HRHD Administrator user and check for any Integration Broker issues on the HCM side.

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## Chapter 12

# Processing Cases

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## Understanding Processing a Case

You perform some case management activities in the Case component on pages other than the Case page.

Pages that are present in PeopleSoft Support, PeopleSoft Analyst Service Center, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources are illustrated only once. Pages that show customer and contact fields are from PeopleSoft Support. Pages that show employee fields are from PeopleSoft HelpDesk cases.

---

## Understanding Solutions

PeopleSoft ERMS, FieldService, Quality Management, and call center applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

You can search for solutions by clicking the Find Solutions button at the bottom of any page in the Case component, or you can access the Solutions page directly.

See "Finding and Attempting Solutions (*PeopleSoft CRM 9.2: Services Foundation*)".

---

## Viewing the Case Summary Page

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

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

- Problem
- Case Information
- Notes Summary
- Tasks
- Attempted Solutions
- Related Actions
- Related Cases

- Interested Parties
- Event History
- Billing Information

---

**Note:** The PeopleSoft system does not deliver all sections of the Case component as active. You must use the pages within the Display Template component to activate the pages, sections, and fields within the Case component that you want to use to implement your system.

---

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Page Used to View the Case Summary Page

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Summary	RC_CASE_SUMMARY	<ul style="list-style-type: none"> <li>• Support, Search Cases, Case, Summary</li> <li>• HelpDesk, Search Cases, Case, Summary</li> <li>• HR HelpDesk, Search Cases, Case, Summary</li> <li>• Analyst Service Center, Search Cases, Case, Summary</li> </ul>	View all the case information on a single page.

## Summary Page

Use the Summary page (RC\_CASE\_SUMMARY) to view all the case information on a single page.

## Navigation

- Support, Search Cases, Case, Summary
- HelpDesk, Search Cases, Case, Summary
- HR HelpDesk, Search Cases, Case, Summary
- Analyst Service Center, Search Cases, Case, Summary

### Image: Summary page (1 of 2)

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

**Case**
08/17/2009 10:04:08AM CDT
 My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

**Case ID** 220070
 **Status** Open - Awaiting User

**Customer** [Michelle Hudson](#)
**Contact**

**Summary** Need to replace the hoses. Schedule a s...
 **Contact Method** 516/331-1288(4578)

**Open Cases** 1
 **Customer Value** Gold ★★★★★

Case | Solution (1) | **Summary** | Notes (1) | Tasks (0) | Case History | Related Cases (0) | ▶

**Problem**

**\*Summary**
Need to replace the hoses. Schedule a service appointment.

**Description**
Need to replace the hoses. Schedule a service appointment.

**Case Information**

Main | More

☐ **Global Case**

**\*Case Status** Open - Awaiting User

**Provider Group** Appliances Western

**Assigned To** David Perry

**Case Priority** Low

**Case Severity** Reproducible

**Notes Summary**
Customize | Find | View All | First 1 of 1 Last

Select	Description	Type	Date Added	Added By
<input type="checkbox"/>	<a href="#">Customer has had same issue with this ap...</a> <div> <b>(Internal Only)</b> </div> Customer has requested repair of this item six months ago. Check that seal is co...		08/17/2009 10:06AM CDT	Fred Dobbs

L | Email | View | Add Note

## Image: Summary page (2 of 2)

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

Attempted Solutions						
Select	ID	Description	Date Modified	Added By	*Resolution Status	
<input type="checkbox"/>	301054	<a href="#">Scheduled SA</a> Scheduled SA	08/17/2009 10:06:25AM CDT	Burt Lee	In Consideration	

☐ [Check All / Clear All](#)

---

**Related Actions**

No related actions have been added.

Related Actions

---

**Interested Parties**

There are no Interested Parties for this Case.

---

---

**Audit History**

<b>Created</b>	02/12/2002 6:08PM PST	<b>By</b>	SAMPLE	Burt Lee
<b>Modified</b>	08/17/2009 8:06AM PDT	<b>By</b>	TEST	Fred Dobbs

Use the Summary page to view and manage case information from a single page.

**Note:** The number to the right of the tabs that appear at the top of the page indicates the number of items that appear on that page. For example, if the system displays the number 2 in parentheses on the Notes tab, then two notes are associated with the case.

## Adding Notes and Attachments

This section provides an overview of notes and attachments and discusses how to add notes and attachments to a case.



## Page Used to Add Notes and Attachments

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Notes	RC_CASE_NOTE	<ul style="list-style-type: none"> <li>Support, Search Cases, Case, Notes</li> <li>HelpDesk, Search Cases, Case, Notes</li> <li>HR HelpDesk , Search Cases, Case, Notes</li> <li>Analyst Service Center, Search Cases, Case, Notes</li> </ul>	Track notes and attachments that are related to cases.

## Understanding Notes and Attachments

Recording notes and attaching files to those notes is often essential to a user's work. Notes are the primary method that is used to track case research and communications. If you exchange files with the caller, you need to associate those files with the case.

PeopleSoft CRM provides a standard interface for working with notes and attachments across all the components that require this functionality. On the Case page, you can use text trays and quick keys to auto-fill static and dynamic data to create notes about a case. The Notes page is enabled when delivered.

---

**Note:** Once a case is closed, you can add a note on the Notes page by clicking the Add Note button or on the Summary page by clicking the Add Note or Attachment button. You cannot enter a note on the Case page in the Add a Note section.

---

## Adding Case Notes for Inbound and Outbound Email

If the ERMS application is licensed and installed, you can set up the system to automatically add notes to cases when inbound email are received and outbound email are sent for them. When the Add every notification as Note to the Associated Case option is selected, the system adds a note to the case for each email it receives and delivers using the information from the email, as described in this table:

<b>Case Note Field Name</b>	<b>Field Value</b>
Subject	<Email subject>
Details	<Email body>
Visibility	<i>All</i>
Note Origin	<i>Inbound, Outbound, Outbound AAF, Outbound Solution, or Outbound Notes</i>
Note Type	<i>Notification</i>
Date Added	<Date and time of when the note was created>

<b>Case Note Field Name</b>	<b>Field Value</b>
Added By	<ul style="list-style-type: none"> <li>For inbound email: &lt;PeopleSoft user who started the ERMS processes&gt;</li> <li>For outbound email sent by an agent: &lt;agent who sent the email&gt;</li> <li>For outbound email sent by an AAF policy: &lt;agent who triggered the policy on the case&gt;</li> </ul>
Customer	For inbound email: <customer who sent the email> For outbound email: <blank>
Contact	<ul style="list-style-type: none"> <li>For inbound email: &lt;customer contact who sent the email&gt;</li> <li>For outbound email: &lt;blank&gt;</li> </ul>
Employee	<ul style="list-style-type: none"> <li>Note for inbound email: &lt;employee who sent the email&gt;</li> <li>Note for outbound email: &lt;blank&gt;</li> </ul>

Here are a list of scenarios where the system adds a case note when an email is received or sent from a case:

- When an agent creates a case from an inbound email on the Recent Activities tab of the email workspace.  
A case note for the inbound email is added to the new case.
- When a case is created automatically from an inbound email (based on a setup option).  
A case note for the inbound email is added to the new case.
- When an agent associates an existing case to an inbound email from the email workspace.  
A case note for the inbound email is added to the existing case.
- When an agent sends an email response for an inbound email on the email workspace and the inbound email is associated with a case.  
A case note for the outbound email response is added to the case.
- When an agent sends an email response for an inbound email from a case.  
A case note for the outbound email is added to the case.
- When an agent sends an outbound email (not a response) from a case.  
A case note for the outbound email is added to the case.
- When a customer sends an email response (inbound email) for an agent's outbound email that is associated with a case.

A case note for the inbound email is added to the case.

- When an agent sends one or more solutions by email from a case.

A case note for the outbound email is added to the case.

- When an agent sends one or more notes by email from a case.

A case note for the outbound email is added to the case.

- When an AAF policy sends an outbound email from a case based on a triggering event.

A case note for the outbound email is added to the case.

- When an agent sends a reminder using the Set Reminder feature from a case.

A case note for the outbound reminder is added to the case.

See "System Installations Page (*PeopleSoft CRM 9.2: Multichannel Applications*)".

## Notes Page

Use the Notes page (RC\_CASE\_NOTE) to track notes and attachments that are related to cases.

## Navigation

- Support, Search Cases, Case, Notes
- HelpDesk, Search Cases, Case, Notes
- HR HelpDesk , Search Cases, Case, Notes
- Analyst Service Center, Search Cases, Case, Notes

## Image: Notes page (1 of 2)

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

Case

08/17/2009 10:04:08AM CDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220070

Status Open - Awaiting User

Customer [Michelle Hudson](#)

Contact

Summary Need to replace the hoses. Schedule a s...

Contact Method 516/331-1288(4578)

Open Cases 1

Customer Value Gold ★★★★★

Case | Solution (1) | Summary | Notes (1) | Tasks (0) | Case History | Related Cases (0) |

\*Filter by Note Type \* All \* Go

Notes Summary Customize | Find | View All | First 1 of 1 Last

Select	Subject and Details	Note Type	Date Added	Added By
<input type="checkbox"/>	<a href="#">Customer has had same issue with this appliance</a> (Internal Only) Customer has requested repair of this item six months ago. Check that seal is correct before replacing hose.		08/17/2009 10:06AM CDT	Fred Dobbs

☐ Check All / Clear All

Email | View | Add Note

## Image: Notes page (2 of 2)

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

**Note Details**

**Added** 08/17/2009 8:06AM Fred Dobbs

**\*Subject** Customer has had same issue with this appliance

**Details**

Customer has requested repair of this item six months ago. Check that seal is correct before replacing hose.

**Note Information**

**\*Visibility** Internal

**Note Type** Internal

**Origin** Internal

**Contact Information**

**Customer**

**Contact**

**Employee**

[Apply Note](#) [Add an Attachment](#)

[Save Case](#) [Find Solutions](#) [Escalate Case](#) [Match Cases](#)

**Audit History**

The Notes Summary region of the page includes the following fields:

### Filter by Note Type

Select a note type for the system to display notes by the selected note type in the Notes Summary section. Values are:

*All* (default value)

*Comment*

*Customer Call*

*Notification*

*Research*

### Subject and Details

Click the subject link to view and edit details of the note in the Note Details section that appears subsequently on the same page.

These values are not available for edit if the case note is created automatically after sending or receiving a notification.

A paperclip icon after the subject indicates that the note has one or more attachments.

### Email

Click this button to send an email based on the selected note(s). Any attachments for the note will be available to include with the email.

See "Understanding Manual Notifications (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

### View

Click this button to view details of the selected note(s) displayed as a separate page.

### Add Note

Click this button to add a note to the case.

The Note Details region of the page includes the following fields:

### Subject

Enter a summary description of the note.

### Details

Enter the main information for the note.

### Visibility

Select *Internal* to limit visibility of the note to internal workers: self-service users will not see this type of note. Select *All* to allow both internal workers and self-service users access to the note.

### Note Type

See "Setting Up Note Types (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

### Origin

Displays the origin of the case note.

- If the note is added manually by an agent, by quick code, or by and AAF policy, the value is *Internal*.
- If the note is added for a self service case, the value is *Self Service*.
- If the note is added for an inbound or outbound email, the value can be *Inbound*, *Outbound*, *Outbound AAF*, *Outbound Solution*, or *Outbound Notes*.

### To/From

Displays the sender or recipient email address for case notes of type *Notification*. If there are multiple recipients for an outbound email, the first 70 characters of all recipient email addresses will be displayed here.

This information is only applicable to notification-specific case notes.

### View Email

Click to view the email message that is associated with this case note.

This link appears if the case note is created for an inbound or outbound email that is received or sent for the associated case.

<b>Visibility</b>	Select whether the note is visible to self-service users. Select <i>All</i> to show this note to both call center personnel and self-service users; select <i>Internal</i> (default value) to hide this note from self-service users.
<b>Contact Information</b>	(optional) Enter the customer contact or employee for whom the note is created.
<b>Add an Attachment</b>	Click this button to attach a file to the note. You will be able to add a description of any attachment that you add. You will also be able to control the visibility of the attachment to hide or display it to self-service users similar to the way that visibility can be controlled for the note.

Agents can use text trays and quick keys to auto-fill static and dynamic data and create notes about a case.

---

**Note:** Static data is text that is part of text tray entry, such as “Customer resolved problem on their own.” Dynamic data includes tokens that the system dynamically resolves when the entry is used. For example, if you want to include the agent's name in a note, you could create a text tray entry such as “Contact {agent name}.” In this example, the text in brackets is the token, and the system substitutes the agent's name when the full text is applied.

---

## Related Links

"Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

---

## Adding Tasks to a Case

The Tasks page provides call center agents with the ability to assign tasks to themselves or to other agents. Agents can add and update task information either on the Task page or on the Task section on the Case Summary page. They can also add a task or drill down to the Task Details page to create or update task details. Users can also create a task when the case is closed.

## Page Used to Add Tasks to a Case

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Tasks	RC_CASE_TSK	<ul style="list-style-type: none"> <li>Support, Search Cases, Case, Tasks</li> <li>HelpDesk, Search Cases, Case, Tasks</li> <li>HR HelpDesk , Search Cases, Case, Tasks</li> <li>Analyst Service Center, Search Cases, Case, Tasks</li> </ul>	Add tasks to a case.

## Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Task Group Template Page (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Tasks Page

Use the Tasks page (RC\_CASE\_TSK) to add tasks to a case.

### Navigation

- Support, Search Cases, Case, Tasks
- HelpDesk, Search Cases, Case, Tasks
- HR HelpDesk , Search Cases, Case, Tasks
- Analyst Service Center, Search Cases, Case, Tasks

### Image: Tasks page

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

**Case** 08/17/2009 10:39:41AM CDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220070 Status Open - Awaiting User  
 Customer Michelle Hudson Contact  
 Summary Need to replace the hoses. Schedule a s... Contact Method 516/331-1288(4578)  
 Open Cases 1 Customer Value Gold ★★★★★

Case Solution (1) Summary Notes (1) Tasks (1) Case History Related Cases (0)

Priority	Type	Subject	Task Status	Location	Start Date	End Date	Owner
	📌	<a href="#">Check connectors and perform sched. maintenance</a>	Open		08/17/2009	08/17/2009	Fred Dobbs

Add Task | Task Group  Add Task Group

Save Case Find Solutions Escalate Case Match Cases

**Audit History**

Created	02/12/2002 6:08PM PST	By	SAMPLE	Burt Lee
Modified	08/17/2009 8:22AM PDT	By	TEST	Fred Dobbs

### Type

Displays various icons to indicate the type of task that appears. For example, if the task type is *To Do*, the system displays a green box with a check mark.

### Subject

Click this link to go to the Task Details page, where you can update task information, add notes, and reassign workers.

### Add Task

Click this button to go to the Task Details page to add new tasks to the case and assign workers to the task. Users can also click this button to create a task after the case has been closed.



See "Understanding Task Management (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

### Task Group

Select a group of tasks to be applied to the case.

### Add Task Group

Apply the group of tasks specified in the Task Group field. All the individual tasks from the specified task group template will be added to the case.

---

**Note:** The only task templates which will appear in this field are those which have a status of *Active* and which belong to the application usage selected for task templates on the corresponding Display Template ID.

---

## Reviewing Case History

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

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

## Pages Used to Review Case History

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Case History - Events	RC_ACTION_HIST	<ul style="list-style-type: none"> <li>• Support, Search Cases, Case, Case History</li> <li>• HelpDesk, Search Cases, Case, Case History</li> <li>• HR HelpDesk, Search Cases, Case, Case History</li> <li>• Analyst Service Center, Search Cases, Case, Case History</li> </ul>	View a summary of important events in the life cycle of a case.
Case History - Interactions	RC_ACTION_HIST	Click the Interactions tab on the Case History page.	View information about interactions related to the case.
Case History - Assignments	RC_ACTION_HIST	Click the Assignments tab on the Case History page.	View information about case assignments.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Case History - 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.

## Understanding Case History

The Case History page has these four subtabs:

- Event History page

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

- Interactions page

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

- Assignments page

This subtab lists all the provider group and agent assignments associated with the case. It also lists the amount of time and percentage of service level consumed by each assignment.

- Audit History page

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

There is some overlap in the data that these pages capture.

See "Case History Configuration Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

### Event History Page

This page displays information about major events in the life of the case, including a description of the event and details of any field changes that are associated with the event.

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

The Interactions Page and the Audit History pages display information that also appears in the case history table. So, whenever there is an interaction, the system displays it on the Interactions page and in the case history table. The same is true for the Audit History page. Whenever a change is picked up by the Audit history page, the system displays it in the case history table.

See "Case History Configuration Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

### Interactions Page

This page displays the events that occurred when a customer contacted the organization. An interaction is created every time a case is opened or accessed through computer telephony integration (CTI), from the 360-degree view, or in self-service.

The system also creates an interaction when agents send notifications, email, and correspondence. The system logs interactions automatically; so they cannot be turned on and off. An interaction may contain multiple subinteractions.

## Assignments Page

This page provides a summary of all the provider group and agent assignments that have been associated to the case. The total elapsed time for each such assignment is displayed so that it is easy to see who has been working on the case and how long they have been working. If the case is associated with an agreement service level and restore time, the percentage of consumed restore time is displayed for each assignment, as well as for the case as a whole.

The percent of service level agreement restore time consumed is calculated as follows:

1. Count the total elapsed minutes from when the assignment was made to when it was changed or to when the case was completed

(For the current assignment of an active case, count the minutes from making the assignment to clicking on the Assignments page subtab.)

2. Subtract any minutes for which the customer was not entitled to service.

This is based on the service level and holiday schedule associated with the customer's agreement, as well as any time during which the case may have been on hold.

3. Divide the result by the total entitled restore time (in minutes) and multiply this by 100.

Consider the following example, in which a case was initially created and assigned to the provider group Appliances Western, and then one hour later was assigned to the agent Mason Orellana.

### Image: Assignments Grid

This is an example in which a case was initially created and assigned to a provider group and then reassigned to an agent.

Assigned Date	Provider Group	Assigned To	Elapsed Time	% SLA Consumed	Changed By
08/31/2007 1:45AM PDT	Appliances Western	Mason Orellana	02:00	8	Stu Marx
08/31/2007 12:45AM PDT	Appliances Western		01:00	4	Teresa Pine

In this example, the agreement restore time associated to the case is 1500 minutes (25 hours). The percent service level agreement (SLA) restore time consumed for the initial assignment is calculated as follows:

$$\% \text{ SLA Consumed} = [ (\text{Date reassigned}) - (\text{Date assigned}) - (\text{Non-covered minutes per SLA}) ] / (\text{Restore time}) * 100$$

$$\% \text{ SLA Consumed} = [ 1:45 \text{ AM} - 12:45 \text{ AM} - 0 ] / 1500 * 100 = 4$$

$$\% \text{SLA Consumed} = [ 60 \text{ elapsed minutes} - 0 \text{ non-covered minutes} ] / 1500 \text{ restore minutes} * 100 = 4 \text{ percent}$$

If the service level for the case agreement specified that the customer had no coverage from 1:00am to 6:00am, then the percent SLA consumed would be different, since 45 minutes of the elapsed time would not be covered by the service agreement. This would be calculated as follows:

$$\% \text{ SLA Consumed} = [ (\text{Date reassigned}) - (\text{Date assigned}) - (\text{Non-covered minutes per SLA}) ] / (\text{Restore time}) * 100$$
$$\% \text{ SLA Consumed} = [ 1:45 \text{ AM} - 12:45 \text{ AM} - 45 ] / 1500 * 100 = 1$$
$$\% \text{ SLA Consumed} = [ 60 \text{ elapsed minutes} - 45 \text{ non-covered minutes} ] / 1500 \text{ restore minutes} * 100 = 1 \text{ percent}$$

---

**Note:** If an agreement is changed on a case that already had an agreement, the percent SLA consumed will be reset to zero for all assignments unless the case is already late. In the event that the case has already missed the SLA and the agreement is changed, the % SLA Consumed values will remain unchanged.

---

## Audit History Page

This page displays record-level changes to case data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). While the system can capture before and after values, no conditional logic exists to evaluate the before and after values of the fields. The system captures all audited actions regardless of the field value. Auditing is delivered disabled.

## Related Links

"Understanding Audit Information (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Understanding Interactions (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Case History - Events Page

Use the Case History - Events page (RC\_ACTION\_HIST) to view a summary of important events in the life cycle of a case.

## Navigation

- Support, Search Cases, Case, Case History
- HelpDesk, Search Cases, Case, Case History
- HR HelpDesk, Search Cases, Case, Case History
- Analyst Service Center, Search Cases, Case, Case History

## Image: Case History - Events page

This example illustrates the fields and controls on the Case History - Events page.

**Case** 08/17/2009 10:49:42AM CDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

**Case ID** 124 **Status** Open - New Case  
**Customer** MMA Property Management Group **Contact** Teri Thomas  
**Summary** Getting rid of permanent film on Glasses... **Contact Method** 800/987-4563  
**Open Cases** 13 **Customer Value** Gold ★★★★★

Case | Solution (1) | Summary | Notes (1) | Tasks (0) | **Case History** | Related Cases (0)

Events | Interactions | Assignments | Audit

**Event History** Customize | Find | 1-4 of 4

Date	Policy Name	Details	Visibility	Changed By
06/13/2000 6:07PM CDT		Case Note	All	STEWART,TOM
06/13/2000 6:07PM CDT		status of case is changed	All	STEWART,TOM
06/13/2000 6:07PM CDT		AssignedToChanged	All	STEWART,TOM
06/13/2000 6:07PM CDT		Case Note	All	STEWART,TOM

Save Case | Find Solutions | Escalate Case | Match Cases

Audit History

**Note:** To populate the Event History grid for adhoc email notifications that are sent from the case, use AAF to create policies. When you create the policy, use the term *Adhoc Email Subject*.

<b>Date</b>	The date that the action occurred.
<b>Policy Name</b>	The system populates this field with the description of the action from the Event Definition page.
<b>Details</b>	Details about the action that was taken. For example, if a case is escalated or the assignment of a case changes.
<b>Visibility</b>	The system displays either <i>All</i> or <i>Internal</i> to indicate who can view the details of the event.
<b>Changed By</b>	The name of the agent who initiated the event.

## Case History - Interactions Page

Use the Case History - Interactions page (RC\_ACTION\_HIST) to view information about interactions related to the case.

### Navigation

Click the Interactions tab on the Case History page.

### Image: Case History - Interactions page

This example illustrates the fields and controls on the Case History - Interactions page.

**Case** History Select One... 08/17/2009 9:46:40AM PDT My Time Zone

Save | Print | Spell Check | 360-Degree View | 360-Degree Search | >> Personalize

**Case ID** 141 **Status** Open - New Case  
**Customer** Lakeview Community College **Contact** John Chase  
**Summary** Removing frost build-up on the inside of... **Contact Method** 701/665-2587  
**Open Cases** 5 **Customer Value** Gold ★★★★★

Case Solution (1) Summary Notes (0) Tasks (0) Case History Related Cases (0)

Events Interactions Assignments Audit

**Interactions** Customize Find 1 of 1

Date/Time Created	Type	Channel	Contact Name	Subject/Description	Created By
08/17/2009 9:46AM	Inbound	Phone	Lakeview Community College	Viewed/Updated Case ID 141	Stu Marx

Save Case Find Solutions Escalate Case Match Cases

Audit History

<b>Date/Time Created</b>	The date and time the agent created the interaction.
<b>Type</b>	The type of interaction, either <i>Inbound</i> or <i>Outbound</i> .
<b>Channel</b>	The method used to initiate the interaction.
<b>Contact Name</b>	The name of the person who was contacted.
<b>Subject/Description</b>	The subject or description of the interaction.
<b>Created By</b>	The name of the person who created the interaction.

## Case History - Assignments Page

Use the Case History - Assignments page (RC\_ACTION\_HIST) to view information about case assignments.

## Navigation

Click the Assignments tab on the Case History page.

### Image: Case History - Assignments page

This example illustrates the fields and controls on the Case History - Assignments page.

**Case** 08/17/2009 10:30:09AM PDT My Time Zone

Save | Print | Spell Check | 360-Degree View | 360-Degree Search | >> Personalize

**Case ID** 220510 **Status** Open - Awaiting Engineering  
**Customer** [Health Conscious.com](#) **Contact** [Gabrielle Sanchez](#)  
**Summary** Condensor unit not working **Contact Method** 408/998-7146  
**Open Cases** 8 **Customer Value** Gold ★★★★★

Case Solution (0) Summary Notes (1) Tasks (0) **Case History** Related Cases (0)

Events Interactions **Assignments** Audit

**Assignments** Customize | Find | 1-2 of 2

Assigned Date	Provider Group	Assigned To	Elapsed Time	% SLA Consumed	Changed By
08/17/2009 10:25:43AM PDT	Appliances Western	Susan Davies	0:04	1	Stu Marx
08/17/2009 10:18:03AM PDT	Appliances Western	John Turner	0:07	2	Stu Marx
<b>Total % SLA Consumed</b>				<b>3</b>	

Save Case Find Solutions Escalate Case Match Cases

Audit History

#### Assigned Date

The date and time that the assignment was created.

#### Provider Group

The provider group to which the case was assigned.

#### Assigned To

The agent to whom the case was assigned.

#### Elapsed Time

The total hours and minutes that have elapsed for this assignment.

#### % SLA Consumed

The percentage of the service level agreement restore time that has been consumed during this assignment.

---

**Note:** This column will not be displayed if the case is not associated with an agreement service level and restore time.

---

#### Changed By

The name of the person who made the assignment.

#### Total % SLA Consumed

The total percentage of the service level agreement restore time consumed for this case.

---

**Note:** This field will not be displayed if the case is not associated with an agreement service level and restore time.

---

## Case History - Audit Trail Page

Use the Case History - Audit Trail page (RC\_ACTION\_HIST) to view detailed information about changes to specific fields in the case.

### Navigation

Click the Audit tab on the Case History page.

### Image: Case History - Audit page

This example illustrates the fields and controls on the Case History - Audit page.

The screenshot shows the 'Case' page for Case ID 220511. The page includes a header with the date and time (08/17/2009 10:33:35AM PDT) and a time zone dropdown (My Time Zone). Below the header is a navigation bar with buttons for Save, Print, Spell Check, 360-Degree View, 360-Degree Search, and Personalize. The case details section shows the Case ID, Customer (Health Conscious.com), Summary (Condensor failing), Open Cases (9), Status (Open - Awaiting User), Contact (Gabrielle Sanchez), Contact Method (408/998-7146), and Customer Value (Gold ★★★★★). Below the details is a tabbed interface with tabs for Case, Solution (0), Summary, Notes (1), Tasks (0), Case History, and Related Cases (0). The Case History tab is selected, and the Audit sub-tab is active. The Audit History table shows a single record for RC\_CASE\_NOTE, with columns for Record Name, Field Name, Action Taken, Date/Time, Changed By, Value Before Change, and Value After Change. The record shows an 'Add' action on 08/17/2009 10:35AM PDT by Stu Marx. Below the table are buttons for Save Case, Find Solutions, Escalate Case, and Match Cases. At the bottom, the Audit History section shows the Created and Modified dates and times, and the user (VP1) who performed the action.

Record Name	Field Name	Action Taken	Date/Time	Changed By	Value Before Change	Value After Change
RC_CASE_NOTE		Add	08/17/2009 10:35AM PDT	Stu Marx		

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, changing, or deleting). However, no conditional logic exists to evaluate the before and after values of the field. The system captures all audited actions regardless of the field value. The fields at the top of the columns are self explanatory or similar to the ones explained on the other pages.

## Managing Related Cases

This section provides an overview of related cases and discusses how to:

- Review and initiate case relationships.
- Identifying similar cases for which you wish to establish a relationship.
- Specify relationship details when relating a case to an existing case.
- Specify relationship details when creating a new case.



## Pages Used to Manage Case Relationships

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Related Cases	RC_RELATIONSHIP	<ul style="list-style-type: none"> <li>Support, Search Cases, Case, Related Cases</li> <li>HelpDesk, Search Cases, Case, Related Cases</li> <li>HR HelpDesk, Search Cases, Case, Related Cases</li> <li>Analyst Service Center, Search Cases, Case, Related Cases</li> </ul>	<p>Manage case relationships, relate cases to each other based on case relationship types that your organization has established, and view and delete existing case relationships.</p> <p>Your organization must define case relationship types and workflow rules for cascading statuses through related cases.</p>
Search Cases	RC_CASE_SEARCH_SEC.	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. You can also specify which information from the originating case to copy into the case that you are creating.

## Understanding Related Cases

Users can relate cases to each other for numerous reasons. Your organization establishes valid case relationship types on the Case Relationship Type page. Each relationship is marked as hierarchical or equivalent (non-hierarchical). Each case in a relationship has a relationship label. If the relationship is hierarchical, the parent case and the child case have separate labels. If the relationship is equivalent, only one valid label exists.

When defining hierarchical relationship types, you can select the Set Parent As Global Case option to make the system automatically designate the parent case as a global case as soon as you establish a relationship between that case and a child case.

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

You can easily search for similar cases from the Case page (using the Match Cases button) or from the 360-Degree View page in order to identify cases that should be related to each other.

The Case Relationships page displays a list of all cases that are related to the current case. Relationships are always reciprocal. If case A is related to case B, then the Related Cases page for both cases reflects the relationship. However, child cases of a common parent do not appear on each other's Related Cases page. Use the Related Cases page of the parent case to see all case relationships at a glance.

Similarly, two cases that are equivalent to a third case do not appear on each other's Related Cases page. That is, the fact that case A is equivalent to both case B and case C does not establish a relationship between case B and case C. To see all equivalent cases in one place, you must make the equivalent cases into children of a common parent.

You can easily choose to make the system cancel any duplicate cases that you identify by associating them with the appropriate original case using a relationship type that has been set to use the option entitled Set status of child case using duplicate case status from the Call Center Business Unit Defaults.

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

Your organization can also use the AAF Case Relationship action to cascade case statuses. You can write a policy to use this action to cascade statuses from a parent case to all of its child cases.

For example, this is useful if your organization establishes a global relationship type for tracking problems where a single solution (such as rebooting a server) fixes a problem for multiple people. In this situation it may make sense to automatically close all child cases when the parent case is closed. When the status cascades to children, any status-related workflow for the child case is triggered, including cascading statuses to the child case's children.

---

**Note:** The Case Relationship policy is delivered inactive in the Case Status Changed policy.

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Methods for relating cases are:

- Relate the current case to another existing case.

For example, you receive four calls reporting problems about your web server before you recognize that this is a global problem. The four cases that you've already created need to be related to each other. When you relate the cases, you can choose one as the parent case and make the other three into children or you can make all four of the original cases into children of a new parent case.

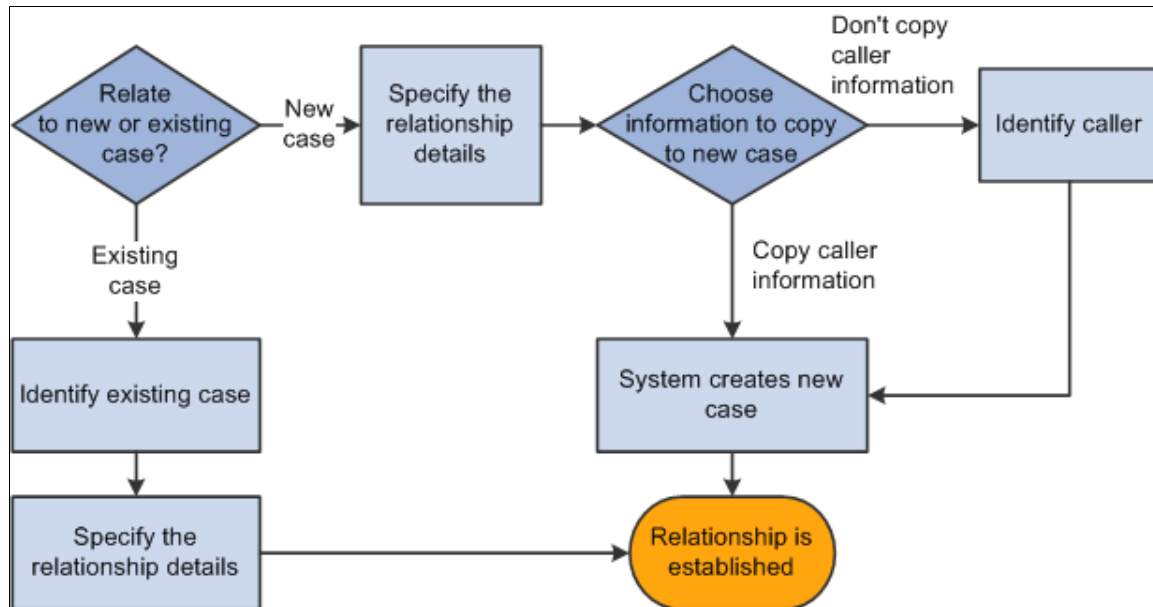
- Create a new case and relate it to the current case.

For example, you've established a global case for your web server problem. Someone calls to report the problem. From the existing global case, you can create a new child case and copy the problem information into the new case.

**Note:** You can also modify the display template to enable the user to relate a case to a new or an existing case on the Case Summary page.

### Image: Methods for relating cases

This diagram illustrates the methods for relating cases, depending on whether the case in question is new or existing.



### Identifying Potentially Related Cases

While reviewing or creating a case you can click the Match Cases button on any page of the case component to search for similar cases using predefined match criteria. Once similar cases are found, you can quickly relate the case to one of the similar cases, such as designating it as the related child of a global case or as a duplicate case that is to be cancelled.

See [Managing Basic Case Information](#).

You can also view potentially related cases for a particular customer or employee by looking at the 360-Degree View. As delivered, the relevant 360-Degree views will contain a folder for global cases with the following nodes:

- *Related*: The Related node displays the global cases for which a related case is already created for the customer or employee. If the global case is for the customer or employee whose 360-Degree View is being displayed, the case will show in the related node
- *Not Related*: The Not Related node displays cases that are not yet related to the customer or employee but which might impact them. It lists existing global cases whose products are the same as those for the installed products of the customer or employee. It also lists global cases that are not associated with any product.
- *View All*: The View All node lists all the global cases from the Related and Not Related nodes.

Selecting any of the nodes from the Global Cases folder will populate the related dynamic grid with information about those cases. Use this grid to see information from the list of global cases or transfer to a global case by clicking on its Case ID link.

**Note:** When the link of a secure global case is selected, you will not be able to access the case unless you are in the provider group assigned to that case. Similarly, for secured cases, the Summary, Product, Case Type, and Incident Location fields will display the word *Secured* instead of the relevant data.

When viewing the Not Related or View All dynamic grids, you can perform a related action on a global case by selecting its row on the grid and choosing the desired action from the Related Actions list. As delivered, the following two actions will be available.

- **Add Child Case:** The Add Child Case action automatically creates a child case and links it to the selected global case. The new case will contain the customer or employee details associated with the current 360-Degree View, and the Problem and Resolution of the global case will be copied over to the new case. If the 360-Degree View has been opened for a company without a contact and the *Add Child Case* action is selected, you will be prompted to search and select the company contact.
- **Add Interested Party:** The Add Interested Party action will add the contact of the customer as an interested party to the global case, and will apply the reason specified from the *Reason Interested* field on the Options page of the Business Unit Call Center Definition setup component. If the 360-Degree View has been opened for a company without a contact and the *Add Interested Party* action is selected, you will be prompted to search and select the company contact.

The Global Cases folder and related dynamic grid on the 360-Degree View is shown here.

### Image: 360-Degree View page with Global Cases folder expanded

This example illustrates the fields and controls on the 360-Degree View page with Global Cases folder expanded.

**360-Degree View**

Refresh | New Search | Add to My Contacts | CTI Dialout | Personalize

360-Degree View | Relationship Viewer | Tasks | Call Reports

\*Role: Company Actions: Add Case Go

**Summary**

Customer: Health Conscious.com  
 Phone: 800/225-4687  
 Email: healthconscious@hc.com  
 Address: 6544 San Tomas Blvd, San Jose, CA, 98744, USA  
 Segment: Retail  
 Status: Active  
 Customer Value: Gold ★★★★★

Apply Changes

**Activities**

\*Date Filter: 6 - Last Year  
 First | Previous | Next | Last | Left | Right

Overview of - Health Conscious.com

- Global Cases
  - Related - (1)
  - Not Related - (0)
  - View All
- Recommendations - (3)
  - Current - (3)
  - Past - (0)
- Agreements - (3)
- Installed Products - (10)

**Global Case (Related)**

Show All Columns

Customize | Find | View All | First | 1 of 1 | Last

Case ID	Summary	Child Cases	Product
220511	Condensor failing	0	

Add Interaction Note

Current Actions

## Relating a Case to an Existing Case

To relate a case to an existing case:

1. On the Related Cases page, click the Relate an Existing Case button.

The Search Cases page appears.

2. Use the Search Cases page to identify the case that you want to associate with the current case.

Enter search criteria to help you find the case and click the Search button. The system returns a list of cases that match your criteria. To select a case, click that case in the results list. The Relate Existing Case - Relationship page appears.

If your search criteria uniquely identifies a case, the system bypasses the list of search results and displays the Relate Existing Case - Relationship page.

3. Use the Relate Existing Case - Relationship page to specify the relationship details.

Specify a relationship type and choose relationship labels for each of the cases. Valid relationship types are defined by your organization and are based on the business unit of the case.

4. Click OK.

The system establishes the relationship and saves the case. The new case relationship appears on the Related Cases page.

Another way to relate an existing case to another is to click the Match Cases button on any page of the Case component, and select the desired case to relate to the current one from among the displayed results.

See [Managing Basic Case Information](#).

## Creating and Relating a New Case

To create a new case related to the current case:

1. On the Related Cases page, click the Create and Relate a New Case button.

The Create a New Case - Relationship page appears.

2. Use the Create a New Case - Relationship page to specify the relationship details.

Specify a relationship type and choose relationship labels for each case. Your organization defines valid relationship types based on the business unit of the case.

3. Select the information to copy from the original case to the new case.

You can copy the customer or employee information, problem information, and resolution information.

4. Click OK.

Customer or employee information is required for all cases. Therefore, if you choose to *not* copy caller information, the Create a New Case - Relations page appears so that you can identify the company-contact or the consumer-employee contact for whom you are creating and relating a case.

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**Note:** Contact information is optional if you are creating a case for a consumer.

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If you choose to copy the caller information, the system immediately creates the new case and returns you to the Related Cases page. The newly established case relationship appears in the Existing Related Cases grid. Select the case link in the Related Cases grid to transfer to the new case.

## Related Links

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

## Related Cases Page

Use the Related Cases page (RC\_RELATIONSHIP) to manage case relationships, relate cases to each other based on case relationship types that your organization has established, and view and delete existing case relationships.

Your organization must define case relationship types and workflow rules for cascading statuses through related cases.

### Navigation

- Support, Search Cases, Case, Related Cases
- HelpDesk, Search Cases, Case, Related Cases
- HR HelpDesk, Search Cases, Case, Related Cases
- Analyst Service Center, Search Cases, Case, Related Cases

### Image: Related Cases page

This example illustrates the fields and controls on the Related Cases page.

The screenshot shows the 'Case' page for Case ID 220511. The page header includes the date and time '08/17/2009 10:50:16AM PDT' and a 'My Time Zone' dropdown. Below the header are navigation links: 'Save', 'Print', 'Spell Check', '360 360-Degree View', '360 360-Degree Search', and 'Personalize'. The case details section shows: Case ID 220511, Customer Health Conscious.com, Status Open - Awaiting User, Contact Gabrielle Sanchez, Summary Condensor failing, Contact Method 408/998-7146, Open Cases 9, and Customer Value Gold ★★★★★. Below the details are tabs: Case, Solution (0), Summary, Notes (1), Tasks (0), Case History, and Related Cases (1). The 'Related Cases' tab is active, showing a grid with one row. The grid has columns: Relationship, Type, Case, Customer, Contact, Status, Date Added, and a Delete button. The row shows: Equal, Equivalent, 220510, Health Conscious.com, Gabrielle Sanchez, Open - Awaiting Eng, 08/17/2009 10:55AM PDT. Below the grid are buttons: 'Relate an Existing Case', 'Create and Relate a New Case', 'Save Case', 'Find Solutions', 'Escalate Case', and 'Match Cases'. At the bottom is an 'Audit History' link.

Relationship	Type	Case	Customer	Contact	Status	Date Added	
Equal	Equivalent	<a href="#">220510</a>	Health Conscious.com	Gabrielle Sanchez	Open - Awaiting Eng	08/17/2009 10:55AM PDT	Delete

The Related Cases grid lists all existing case relationships.

### Relationship

Describes how the current case relates to the related case.

If the relationship is hierarchical, the parent case and the child case can have different values in this field. For example, one

value might be *Global Case* and the other value might be *Ticket*. If the relationship is equivalent, only one label is valid.

<b>Type</b>	<p>The relationship type.</p> <p>This value is the same for both cases in the relationship. For example, if your organization established a relationship type called <i>Global</i>, then both the parent and child record have <i>Global</i> in the Type column.</p>
<b>Case</b>	The case number of the related case. Click the case number link to display the related case.
<b>Customer and Name</b>	For a PeopleSoft Support case, these fields identify the customer and contact who are associated with the related case.
<b>Employee and EmplID (employee ID)</b>	For a PeopleSoft HelpDesk case, these fields identify the employee who is associated with the related case.
<b>Status</b>	The status of the related case. The system gets this information from the Case Status field for the case.
<b>Date Added</b>	The date and time that the relationship was established.
<b>Delete</b>	Click to delete the case relationship. Clicking this button does not delete either case, only the relationship.

## Creating New Case Relationships

<b>Relate an Existing Case</b>	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.
<b>Create and Relate a New Case</b>	Click to display the Create a New Case - Relationship page, where you can choose the information to be copied to the new case and establish the relationship between the cases.

## Relate Existing Case - Relationship Page

Use the Relate Existing Case - Relationship page (RC\_REL\_TYPE\_SEC) to specify the relationship details when relating a case to an existing case.

## Navigation

Select the case on the Relate Existing Case - Search page.

### Image: Relate Existing Case - Relationship page

This example illustrates the fields and controls on the Relate Existing Case - Relationship page.

**Relate Existing Case**  
**Relationship**

Select the relationship characteristics between Case 220511 and Case 220070.

**Relate an Existing Case**

\*Relationship Type Global

\*Case 220511 Parent

\*Case 220070 Child

OK Cancel

\* Required Field

#### Relationship Type

Specify a relationship type. Relationship types can be either hierarchical (parent-child) or nonhierarchical. Your organization defines values that are based on the business unit of the case.

#### Case (current case number) and Case (related case number)

Select relationship labels for the current case and the case that you're relating to it.

If the relationship is hierarchical, one valid label exists for the parent case and one valid label exists for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship.

If the relationship is not hierarchical, only one valid label exists. Select that label for both cases.

## Related Links

[Case Relationship Type Page](#)

## Create a New Case - Relationship Page

Use the Create a New Case - Relationship page (RC\_REL\_COPY) to specify the relationship details when you create a new related case.

You can also specify which information from the originating case to copy into the case that you are creating.



## Navigation

Click the Create and Relate a New Case button on the Related Cases page.

### Image: Create a New Case - Relationship page

This example illustrates the fields and controls on the Create a New Case - Relationship page.

## Characteristics

### Relationship Type

Specify a relationship type. Relationship types can be either hierarchical (parent-child) or nonhierarchical. Values are defined by your organization and are based on the business unit of the case.

### Case (current case number) and New Case

Select relationship labels for both the current case and the new case that you're creating.

If the relationship is hierarchical, one valid label exists for the parent case and one valid label exists for the child case. Match the cases to the appropriate labels to establish the desired parent-child relationship.

If the relationship is not hierarchical, only one valid label exists. Select that label for both cases.

## Information

The system always copies the business unit to the new case. You choose which other information to copy to the new case.

### 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.

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**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.

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**Resolution**

Select this check box to copy resolution information from the originating case to the new case. The system copies all attempted resolutions and their statuses, but not the resolution notes.

**OK**

Click this button to create the new case, establish the relationship between the two cases, and return to the Related Cases page. If you are not copying caller information, the system prompts you to identify the caller for the new case before the case is created.

**Cancel**

Click this button to return to the Related Cases page without establishing the relationship.

**Related Links**

[Understanding Case Management](#)

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

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## Managing Related Actions

This section provides an overview of related actions and discusses how to:

- Review related actions and initiate new relationships.
- Use business projects.
- Send case surveys.
- Initiate and relate scripts.
- Relate existing quality defects.

- Create new defects.
- Create and relate sales leads.
- Create and relate sales orders.
- Create and relate a return material authorization (RMA).
- Create and relate service orders.
- Relate change requests.
- Create change requests.

## Pages Used to Relate a Case to Other PeopleSoft CRM Objects

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Related Actions	RC_ASSOCIATION	<ul style="list-style-type: none"> <li>• Support, Search Cases, Case  Scroll down to the Actions section.</li> <li>• HelpDesk, Search Cases, Case  Scroll down to the Actions section.</li> <li>• HR HelpDesk, Search Cases, Case  Scroll down to the Actions section.</li> <li>• Analyst Service Center, Search Cases, Case  Scroll down to the Actions section.</li> </ul>	Relate a case to other PeopleSoft CRM objects. In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HR database. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Use Business Project	RC_LINK_GENBP_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Business Project</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Business Project</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Business Project</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Associate business projects with a case.
Send Case Survey	RC_LINK_SEND_SRVY	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Case Survey</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Case Survey</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Case Survey</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Send case surveys to existing customers.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Use Branch Script	RC_LINK_SCRIPT_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Branch Script</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Branch Script</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Branch Script</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Select a branch script to relate to a case.
Defects and Enhancements	RC_CASE_DEFECT_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Defect - Relate Existing</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Defect - Relate Existing</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Defect - Relate Existing</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Search for and identify a defect to relate to the case.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Quality Management - Defect	RQ_DEFECT_MAIN	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Defect - Create New</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Defect - Create New</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Defect - Create New</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Add a new defect and relate it to the case.
Return Material Authorization	RC_RMA_HDR	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Create RMA</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Create RMA</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Create RMA</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Create an RMA and relate it to the current case.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Sales Lead	RC_LINK_LEAD_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Sales Lead</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Sales Lead</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Sales Lead</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Create a sales lead and relate it to the current case.
Create Order	RC_LINK_RO_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Sales Order</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Sales Order</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Sales Order</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Create an order and relate it to the current case.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Service Order	RC_LINK_RO_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Service Order</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Service Order</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Service Order</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Create a service order and relate it to the current case.
Change Requests	RC_CASE_CHANGE_SEC	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Change Request - Relate</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Change Request - Relate</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Change Request - Relate</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Search for and identify a change request to relate to the case.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Change Request	RG_CHANGE_REQUEST	<ul style="list-style-type: none"> <li>• In the Actions section on the Case page, select <i>Change Request - Create New</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Summary page, select <i>Change Request - Create New</i> from the Related Actions drop-down list box, then click the Go button.</li> <li>• In the Related Actions section on the Related Actions page, select <i>Change Request - Create New</i> from the Related Actions drop-down list box, then click the Go button.</li> </ul>	Create change requests.

## Understanding Related Actions

In PeopleSoft CRM, you can:

- Manually create a related action on a case.
- Configure the system so that selecting a quick code suggests an action.
- Configure the system so that PeopleSoft's AAF system suggests an action.

### Related Actions for PeopleSoft Support, HelpDesk, and Service Center for Higher Education Cases

This table lists and describes delivered actions you can associate with PeopleSoft Support, PeopleSoft HelpDesk, and Service Center for Higher Education cases:

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**Important!** Some of the listed actions are role-specific (for example, worker, company contact, or consumer). If an action is attempted for someone whose role does not permit that action, or if that someone is associated with more than one role and the system is unable to determine for which role that action should be created, an error message will be displayed to inform the user that the action is not available.

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**Note:** In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HR database instead of the related actions listed below. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.

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<b>Link</b>	<b>Description</b>	<b>Applicable To</b>	<b>Role-Specific?</b>
Asset Administrator	Launches an asset management application from a case to gather information about networked devices.	HelpDesk, and Higher Education cases	Worker
Asset Summary	Launches an asset management application, which passes the desired asset information to the application for reporting.	HelpDesk, and Higher Education cases	Worker
Branch Script	Launches a specified branch script.	Support and Higher Education cases	Consumer or Company Contact
Business Project	<p>Launches the Use Business Project page, which lets the user select a business project that they want to associate with the case.</p> <p>You can set up additional link definitions to launch a specific business project.</p>	Support, HelpDesk, and Higher Education cases	No
Case Survey	<p>Launches the Send Case Survey page, where an agent can enter a business unit, dialog name, and action to send a survey to the customer.</p> <hr/> <p><b>Important!</b> You can also set up this link to automatically launch a survey and bypass the Send Case Survey page. In addition, the PeopleSoft system delivers the roles of Call Center Manager and Help Desk Manager to this permission list to be used for the new survey reports. Users who are not authorized to view the reports will not be able to see the links in the Related Actions field.</p> <hr/>	Support and Higher Education cases	No
Change Request - Create New	Creates a new change request.	HelpDesk, and Higher Education cases	Worker

<b>Link</b>	<b>Description</b>	<b>Applicable To</b>	<b>Role-Specific?</b>
Change Request - Relate Existing	<p>Relates an existing change request to the case.</p> <p>For example, you may want to use Change Request - Relate Existing when a caller has a problem with their email system. The agent knows that this has been a reported problem in the past and finds a related change request.</p> <p>Through Related Actions, the agent associates this new case to the existing change request.</p>	HelpDesk, and Higher Education cases	Worker
Create RMA	An RMA authorizes a customer to return defective or unwanted materials.	<p>Support and Higher Education cases</p> <p>You can manage RMAs only if PeopleSoft Support is integrated with PeopleSoft Inventory.</p>	Consumer or Company Contact
Defect - Create New	Create defects to identify problems with your products.	Support, HelpDesk, and Higher Education cases	No
Defect - Relate Existing	Associate existing defects with cases.	Support, HelpDesk, and Higher Education cases	No
Remote Control	Launches the asset management application from a case to perform troubleshooting on a remote device, such as an employee's laptop.	HelpDesk, and Higher Education cases	Worker
Sales Lead	Sales leads populate the sales pipeline.	<p>Support and Higher Education cases</p> <p>You can create sales leads only if you have implemented PeopleSoft Sales.</p>	Consumer or Company Contact
Sales Order	A sales order records a request for a product that is provided by your company's sales, marketing, or field services organization.	<p>Support and Higher Education cases</p> <p>You can create sales orders only if you've implemented PeopleSoft Order Capture.</p>	Consumer or Company Contact

<b>Link</b>	<b>Description</b>	<b>Applicable To</b>	<b>Role-Specific?</b>
Service Order	A service order records a request for a service that is provided by your company's field services organization.	Support and Higher Education cases  You can create service orders only if you've implemented PeopleSoft FieldService.	Consumer or Company Contact
Software Delivery	Launches your third-party Software Delivery application, which can be used to install software on various identified assets.	HelpDesk, and Higher Education cases	Worker
Work Order - Create New	Launches the Create Work Order page, where an agent who is working on a help desk case can create a work order from the case to assign a technician to troubleshoot and solve the problem.	HelpDesk, and Higher Education cases	Worker

See [Link Group Page](#).

See "Understanding Display Templates (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Service Order and Material Return Comparison

When customers report problems with broken or defective parts or materials, you can do one of the following:

- If the customer is entitled to on-site service, create a service order so that your organization can send a field service technician to the customer's site to repair the part.
- If the customer is not entitled to on-site service, create a return material authorization (RMA) so that the customer can return the merchandise.

## Related Actions Page

Use the Related Actions page (RC\_ASSOCIATION) to relate a case to other PeopleSoft CRM objects.

In PeopleSoft HelpDesk for Human Resources, there are other action links to pages in the HR database. In PeopleSoft Service Center for Higher Education, there are action links to pages in the PeopleSoft Campus Solutions application.

## Navigation

- Support, Search Cases, Case  
Scroll down to the Actions section.
- HelpDesk, Search Cases, Case  
Scroll down to the Actions section.
- HR HelpDesk, Search Cases, Case  
Scroll down to the Actions section.
- Analyst Service Center, Search Cases, Case  
Scroll down to the Actions section.

## Image: Related Actions page

This example illustrates the fields and controls on the Related Actions page.

**Case** 08/17/2009 10:50:16AM PDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

Case ID 220511 Status Open - Awaiting User  
 Customer [Health Conscious.com](#) Contact [Gabrielle Sanchez](#)  
 Summary Condensor failing Contact Method 408/998-7146  
 Open Cases 9 Customer Value Gold ★★★★★

Notes (1) Tasks (0) Case History Related Cases (1) Related Actions (1) Interested Parties (0)

**Related Action Summary** Customize | Find | First 1 of 1 Last

Type	Summary	Status	Date Created	Added By
Service Order	<a href="#">SVC0300002 - Repair Air Condit...</a>	Open	08/17/2009 11:06AM PDT	Stu Marx

Related Actions Case Survey Go

Save Case Find Solutions Escalate Case Match Cases

Audit History

## Related Actions Summary

This grid lists all existing relationships between the current case and other PeopleSoft CRM objects.

### Type

The types of related objects include: *Customer Satisfaction Script*, *Lead Qualification Script*, *Troubleshooting Guide*, *Business Project*, *Sales Lead*, *Sales Order*, *RMA*, *Quality Defect*, or *Service Order*.

### Summary

A description of the object, derived from the description field on the page where the object is maintained.

### Status

Indicates the status of the related object that is associated with the case.

**Date Created**

The date that the object was created and associated with the case.

**Related Actions**

Select the type of action that you want to create and relate to the case.

---

**Note:** Based on the products that you have installed you may want to change the list of objects that appear in the drop-down list box. For example, if you don't have PeopleSoft FieldService installed, you wouldn't want Service Order to appear.

---

See "Industry-Specific Translates Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

**Go**

After you select an action, click Go to access the page where you enter information specific to the type of object that you're creating.

**Refresh Related Actions**

Click this button to refresh the Status field for the work orders or other related actions that you executed from this page.

This button is hidden when you first install the application. You must use the Display Template pages to configure this page to display the button.

## Use Business Project Page

Use the Use Business Project page (RC\_LINK\_GENBP\_SEC) to associate business projects with a case.

**Navigation**

- In the Actions section on the Case page, select *Business Project* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Business Project* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Business Project* from the Related Actions drop-down list box, then click the Go button.

**Image: Use Business Project page**

This example illustrates the fields and controls on the Use Business Project page.

Select the business project that you want to use for the case. Click the Use Business Project button to launch the business project.

## Related Links

"Understanding Business Projects (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Send Case Survey Page

Use the Send Case Survey page (RC\_LINK\_SEND\_SRVY) to send case surveys to existing customers.

### Navigation

- In the Actions section on the Case page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Case Survey* from the Related Actions drop-down list box, then click the Go button.

### Image: Send Case Survey page

This example illustrates the fields and controls on the Send Case Survey page.

Select the business unit, dialog name, and action that you want to use to send a survey to the customer associated with the case; click OK.

---

**Note:** You can also set up this link to automatically launch a survey and bypass the Send Case Survey page. To do this, you must modify the system data and use the Search Keys group box on the Link Definition page to select the last three terms that appear under Call Center, Link Definition after you select the Add Term button. These terms are: *Select a Dialog Business Unit <BUSINESS\_UNIT>*, *Select a Dialog ID <DIALOG\_ID>*, and *Select an External Event Trigger <EXT\_EVENT\_TRIGGER>*.

---

## Related Links

[Understanding Link Setup](#)

"Understanding Surveys (*PeopleSoft CRM for Online Marketing 9.2*)"

## Branch Script Page

Use the Use Branch Script page (RC\_LINK\_SCRIPT\_SEC) to select a branch script to relate to a case.

### Navigation

- In the Actions section on the Case page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Branch Script* from the Related Actions drop-down list box, then click the Go button.

### Image: Use Branch Script page

This example illustrates the fields and controls on the Use Branch Script page.

**Note:** You can relate a different branch script multiple times to a single case. You can also relate the same branch script to a single case multiple times.

<b>Branch Script</b>	Select the desired script from the predefined scripts available in the list.
<b>Use Branch Script</b>	Click to launch the script on the Execute Script page. Once you launch the script, the relationship between the case and the script is established.

### Related Links

"Understanding Scripts (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Defects and Enhancements Page

Use the Defects and Enhancements page (RC\_CASE\_DEFECT\_SEC) to search for and identify a defect to relate to the case.



## Navigation

- In the Actions section on the Case page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Defect - Relate Existing* from the Related Actions drop-down list box, then click the Go button.

## Image: Defects and Enhancements page

This example illustrates the fields and controls on the Defects and Enhancements 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 that you want to relate to the case. The default comes from the Business Unit (Quality) field in the Call Center BU page.

### Defect ID

Select the defect that you want to relate to the current case.

## Related Links

[Defining Call Center Business Units](#)

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Quality Management - Defect Page

Use the Quality Management - Defect page (RQ\_DEFECT\_MAIN) to add a new defect and relate it to the case.

## Navigation

- In the Actions section on the Case page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Defect - Create New* from the Related Actions drop-down list box, then click the Go button.

### Image: Quality Management - Defect page (1 of 2)

This example illustrates the fields and controls on the Quality Management - Defect page (1 of 2).

**Quality Management** History Select One...

Save Refresh | Notification Clone Search | Personalize

**Defect Id** NEXT **Status** OPEN  
**Priority** Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions

**Defect Information**

\*Date Reported 08/17/2009  
Reported By Stu Marx  
\*Type Defect  
\*Subject Refrigerator condensor needs to be cleaned  
Description Refrigerator condensor needs to be cleaned  
Duplicate of  
Duplicate Subject

\*Business Unit CRMCO APPLIANCES  
\*Status Open  
\*State  
\*Reason  
\*Priority Medium  
Severity

Date Resolved

### Image: Quality Management - Defect page (2 of 2)

This example illustrates the fields and controls on the Quality Management - Defect page (2 of 2).

The screenshot displays the 'Quality Management - Defect page (2 of 2)'. It features a 'Product Information' section with fields for \*Product, \*Production ID, Version, Component ID, \*Symptom, \*Product Impact, Phase, Suspect. Cause, Repeatability, Verified On, and Verified By. Below this is a 'Responsible Parties' section with a message 'No Responsible Parties have been added.' and a button 'Add a Responsible Party'. The 'Environment' and 'Audit History' sections are collapsed. At the bottom, there are buttons for 'Save', 'Refresh', 'Notification', 'Clone', 'Search', and a 'Top of Page' link. A legend indicates '\* Required Field'.

For instructions about using the Quality Management - Defect page:

See [Understanding Defect and Fix Tracking](#).

## Create Sales Lead Page

Use the Create Sales Lead page (RC\_LINK\_LEAD\_SEC) to create a sales lead and relate it to the current case.

## Navigation

- In the Actions section on the Case page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Sales Lead* from the Related Actions drop-down list box, then click the Go button.

## Image: Create Sales Lead page

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

---

**Note:** Only PeopleSoft Support or Service Center for Higher Education users can create sales leads. This functionality is not available in PeopleSoft HelpDesk applications.

---

<b>Business Unit</b>	Select a sales business unit for the lead that you're creating. The default comes from the Sales Unit field on the Call Center BU page.
<b>Description</b>	Enter a description for the new lead.
<b>Create Sales Lead</b>	Click to create the lead.

## Related Links

"Creating a Sales Lead (*PeopleSoft CRM 9.2: Sales*)"

"Creating a Sales Opportunity (*PeopleSoft CRM 9.2: Sales*)"

## Create Order Page

Use the Create Order page (RC\_LINK\_RO\_SEC) to create an order and relate it to the current case.

## Navigation

- In the Actions section on the Case page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Sales Order* from the Related Actions drop-down list box, then click the Go button.

## Image: Create Order page

This example illustrates the fields and controls on the Create Order page.

**Case**

### Create Order

Enter Business Unit and Description for this order.

\*Business Unit

\*Description

[Return to Case](#)

\* Required Field

---

**Note:** Only PeopleSoft Support or Service Center for Higher Education users can create orders. This functionality is not available in PeopleSoft HelpDesk applications.

---

<b>Business Unit</b>	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.
<b>Description</b>	Enter a description for the new order.
<b>Create Order</b>	Click to create the order.

## Related Links

"Understanding Order Capture (*PeopleSoft CRM 9.2: Order Capture Applications*)"

## Return Material Authorization Page

Use the Return Material Authorization page (RC\_RMA\_HDR) to create an RMA and relate it to the current case.

## Navigation

- In the Actions section on the Case page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Create RMA* from the Related Actions drop-down list box, then click the Go button.

## Image: Return Material Authorization page

This example illustrates the fields and controls on the Return Material Authorization page.

**Returns**

Save | Search | Add RMA | Next | Previous | 360-Degree View | 360-Degree Search | >> Personalize

RMA Number 100300010 Case ID 220426  
Unit APP01 - Appliances

Return Material Authorization | Notes

**Contact Information**

\*Case ID 220426 Contact Jim Jacobs  
Phone 988-5600(650) Email jimjacobsdch@yahoo.com

**Return Product Information** Find First 1 of 1 Last

\*Return to IBU Appliances \*Return Date 02/19/2006  
\*RMA Line Type Advanced Exchange \*Problem Code Item Defective  
Site 1200 Lake Dr Circlepine MN USA  
Serial ID SR1004-3001 Lot ID  
Product ID SR1004  
\*Item ID SR1004  
\*Qty Returned 1.0000  
Requester BLEE  
Comments

Product Name 18000 BTU Room Air (Grey)  
Item Name 18000 BTU Room Air (Grey)  
UOM EA

**Replacement Item(s)** Personalize Find View All First 1 of 1 Last

Replacement Item ID	Replacement Item Name	Quantity Requested	UOM
SR1004	18000 BTU Room Air (Grey)	1.0000	EA

Go to: View Status Requisition Workbench

**Note:** Only PeopleSoft Support users or Service Center for Higher Education can create RMAs. This functionality is not available in PeopleSoft HelpDesk applications.

## Related Links

[Understanding Material Return Processing](#)

## Create Service Order Page

Use the Create Service Order page (RC\_LINK\_RO\_SEC) to create a service order and relate it to the current case.

## Navigation

- In the Actions section on the Case page, select *Service Order* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Service Order* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Service Order* from the Related Actions drop-down list box, then click the Go button.

## Image: Create Service Order page

This example illustrates the fields and controls on the Create Service Order page.

---

**Note:** Only PeopleSoft Support or Service Center for Higher Education users can create service orders; this functionality is not available in PeopleSoft HelpDesk applications.

---

<b>Business Unit</b>	Select a business unit for the service order that you're creating. The default comes from the Service Order Unit field in the Call Center BU page.
<b>Service ID</b>	Select the service that is to be performed.
<b>Create Service Order</b>	Click to create the service order.

## Related Links

"Understanding Service Orders (*PeopleSoft CRM 9.2: Integrated FieldService*)"

## Change Requests Page

Use the Change Requests page (RC\_CASE\_CHANGE\_SEC) to search for and identify a change request to relate to the case.

## Navigation

- In the Actions section on the Case page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Change Request - Relate* from the Related Actions drop-down list box, then click the Go button.

### Image: Change Requests search page (1 of 2)

This example illustrates the fields and controls on the Change Requests search page (1 of 2).

### Image: Change Requests search page (2 of 2)

This example illustrates the fields and controls on the Change Requests search page (2 of 2).

Change Requests					
Customize   Find   View All   First 1-3 of 3 Last					
Summary Category					
Change Request ID	Unit	Category	Priority	Type	Sub Type
<a href="#">400001</a>	ITHDK	Major	Medium	Hardware	
<a href="#">400002</a>	ITHDK	Minor	Medium	Hardware	
<a href="#">400003</a>	ITHDK	Minor	Medium	Hardware	
Return					



---

**Note:** Only PeopleSoft HelpDesk or Service Center for Higher Education users can relate change requests; this functionality is not available in PeopleSoft Support applications.

---

To relate an existing change request to a case, click one of the change requests that appears in the Search Results grid. The Change Request appears in the Related Actions Summary grid on the Case - Summary page and the Case - Related Actions page.

To add a new change request, click the Add Change Request button at the bottom of the page.

## Change Request Page

Use the Change Request page (RG\_CHANGE\_REQUEST) to create change requests.

## Navigation

- In the Actions section on the Case page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Summary page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button.
- In the Related Actions section on the Related Actions page, select *Change Request - Create New* from the Related Actions drop-down list box, then click the Go button.

### Image: Change Request page (1 of 2)

This example illustrates the fields and controls on the Change Request page (1 of 2).

### Image: Change Request page (2 of 2)

This example illustrates the fields and controls on the Change Request page (2 of 2).

---

**Note:** Only PeopleSoft HelpDesk or Service Center for Higher Education users can create change requests. This functionality is not available for PeopleSoft Support users.

---

For instructions about using the pages in this component:

See [Understanding Change Request Management](#).

---

## Identifying Interested Parties

The main people associated with a case are those who have the problem (customer contacts, consumers and their contact, employees and their alternate contacts) and the agent to whom the case is assigned.

Additionally, there may be many other people interested in the case and its progress, such as agents who are working on the case or a similar case, a customer's account manager and sales representative, and so on.

By adding people to the list of interested parties for the case, you facilitate communication with these people. When you send a notification from the case, the Outbound Notification page includes a check box that you can select to send the notification to the interested parties in addition to any other addressees.

## Page Used to Identify Interested Parties

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Interested Parties	RC_INTEREST_PARTY	<ul style="list-style-type: none"> <li>Support, Search Cases, Case  Click the Add Interested Parties button on the Summary page</li> <li>HelpDesk, Search Cases, Case  Select the Add Interested Parties button on the Summary page.</li> <li>HR HelpDesk, Search Cases, Case  Select the Add Interested Parties button on the Summary page.</li> <li>Analyst Service Center, Search Cases, Case  Select the Add Interested Parties button on the Summary page.</li> </ul>	List the names of people who might want to receive information about this case.

## Interested Parties Page

Use the Interested Parties page (RC\_INTEREST\_PARTY) to list the names of people who might want to receive information about this case.

### Navigation

- Support, Search Cases, Case

Click the Add Interested Parties button on the Summary page

- HelpDesk, Search Cases, Case

Select the Add Interested Parties button on the Summary page.

- HR HelpDesk, Search Cases, Case

Select the Add Interested Parties button on the Summary page.

- Analyst Service Center, Search Cases, Case

Select the Add Interested Parties button on the Summary page.

### Image: Interested Parties page

This example illustrates the fields and controls on the Interested Parties page.

**Case** 08/19/2009 8:01:01AM PDT My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

**Case ID** 220069 **Status** Open - Awaiting User  
**Customer** Cady Montgomery **Contact** Fred Albright  
**Summary** The refrigerator Door is broken. Need to... **Contact Method** 651/785-6687(2834)  
**Open Cases** 2 **Customer Value** Gold ★★★★★

Notes (0) | Tasks (0) | Case History | Related Cases (0) | Related Actions (0) | Interested Parties (2)

Enter the Name in the following format: First Name Last Name

*Name	*Reason	Date Added
Sabrina Redford	Call Center Manager	08/19/2009 8:03AM
Ted Powell	Account Representative	08/19/2009 8:03AM

Add Interested Parties

Save Case | Find Solutions | Escalate Case | Match Cases

Audit History

### Name

To be an interested party, a person must have a person record in the PeopleSoft CRM database.

For the system to send notifications to the person, the person must have a user ID (for worklist notifications) or an email address (for email notifications).

### Reason

The reason that the person is included as an interested party. Your organization defines values based on the business unit of

the case. The reason codes shown here are those defined with the reason type *Reason Interested*.

#### Date Added

The date and time that the person was added as an interested party.

---

## Recording Billing Information

The PeopleSoft system enables the PeopleSoft Support and vertical applications that are using PeopleSoft Support to bill for their services. Cases with an agreement can be billed through contracts. Cases with a warranty, or no agreement, are called on demand and sent to the contract interface table, and then to billing. The PeopleSoft Contracts system takes care of the billing and accounting rules.

The Billing page is delivered hidden. If you want to bill for cases, modify the template to enable the page and perform the setup for billing.

---

**Note:** This functionality is not available to PeopleSoft HelpDesk, HelpDesk for Human Resources, or Analyst Service Center. You can control access to the billing page using regular role based security. Only the manager role has access; agents do not have access

---

See "Understanding PeopleSoft CRM Integration with the Transaction Billing Processor (*PeopleSoft CRM 9.2: Services Foundation*)".

## Page Used to Record Billing Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Billing	RC_CASE_BI	Support, Search Cases, Case, Billing	Manage billing information for a case.

## Billing Page

Use the Billing page (RC\_CASE\_BI) to manage billing information for a case.

## Navigation

Support, Search Cases, Case, Billing

### Image: Billing page

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

**Case** 08/19/2009 8:07:21AM PDT My Time Zone

Save | Print | Spell Check | 360-Degree View | 360-Degree Search | >> Personalize

**Case ID** 273 **Status** Open - New Case  
**Customer** Cady Montgomery **Contact** Fred Albright  
**Summary** Refrigerator condensor needs to be clean... **Contact Method** 651/785-6687(2834)  
**Open Cases** 2 **Customer Value** Gold ★★★★★

Tasks (0) Case History Related Cases (0) Related Actions (0) Interested Parties (0) **Billing**

**Billing Information**

**Bill To Customer** Cady Montgomery  
**Bill To Contact** Fred Albright  
**Bill To Address** 5575 White Tail Lane, Colorado  
**Billing Currency** USD US Dollar

**Payment Information**

**Purchase Order**  
☒ **Invoice** **Payment Terms** NET30  
☐ **Credit Card** [Credit Card Information](#)  
[Tax Parameters](#)

**Billing Details**

**Currency Code** USD **Billing Status** Pending

Fee	Price +/-	Adjustment	Type	Adjust Amount	Reason	Total Price
Case Fee	0.00000	+ 80.00000	Amount	80.00000	Other	80.00000
<b>Grand Total</b>						80.00000

Recalculate Totals Clear Adjustments

This page serves multiple purposes. It enables a user with a manager role to view billing information, purchase order numbers, and authorize credit card information for the service that is performed at the customer site. It also enables users to view subtotals for fees by case or by time, apply adjustments to transaction fees, recalculate totals, and view the billable amount in the customer's currency.

## Billing Information

The system populates this group box with information from the bill to customer on the case.

### 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.

### Credit Card Information

Click to access the Credit Card Details page, where you enter credit card authorization information, such as the card type, card number, expiration month, and year. The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page.

---

**Note:** You can integrate credit card information with Cybersource, a third-party taxware vendor.

---

### Tax Parameters

Click to access the Tax Parameters page, where you indicate whether the customer is exempt from taxes. If the customer is tax exempt, enter the exemption certificate number and tax code that the customer supplies to you.

The system uses a default tax code based on the customer's address, but you can override it by choosing another value.

## Billing Details

A case can be billed by case (flat fee) or time. Billing applies to either on demand cases or agreement cases. When a case is created with an agreement, and pricing is enabled from the installation options component, the case is billed based on the transaction fee defined in that agreement line.

The transaction fee can be either a flat fee or time based. When a case is created without an agreement, the on-demand case fee is applied. Based on business unit setup (whether the on-demand case is billed by time or by case), it retrieves pricing information from the pricing setup for either case-based or time-based billing.

When a case is billed by case, only a flat fee is applied. When a case is billed by time, it is billed based on the total billable hours worked on that case, multiplied by the hourly rate. Once the case is billed, you cannot enter any more billable hours.

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system then calculates the sum of all lines, including those that have changed, and provides the recalculated amount in the Total Amount field.

+/-

Select the plus sign (+) to indicate a positive adjustment to the price or the minus sign (-) to indicate a negative adjustment to the price.

**Adjustment**

Enter either a currency amount or a percentage value.

**Type**

Select *Percent* or *Amount*.

**Reason**

Select the reason for the adjustment. These values are user-definable on the Reason Code setup page. The PeopleSoft system delivers this feature without any valid values.

**Other**

If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page, where you can enter a unique description of the reason.

**Recalculate Totals**

Click this button any time there is a change to the Billing Details grid that affects the price or the currency code. The system recalculates the total cost of the fees.

**Clear Adjustments**

Click this button to clear the adjustments that were made and return to the original total amounts.

---

## Entering Attribute Information

Attributes enable you to extend the information stored for a case without modifying that case's base table. This capability is valuable when you want to capture additional information about a case that is not available.

For example, you might need to capture the color and size attributes for certain types of products but not for all products. Because these attributes are relevant only for some products, you do not want to add them as fields to the base table itself.



## Page Used to Enter Attribute Information

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Attributes	RC_ATTR_CASE	<ul style="list-style-type: none"> <li>• Support, Search Cases, Case, Attributes</li> <li>• HelpDesk, Search Cases, Case, Attributes</li> <li>• HR HelpDesk, Search Cases, Case, Attributes</li> <li>• Analyst Service Center, Search Cases, Case, Attributes</li> </ul>	Add user-defined information to the case.

### Related Links

"Understanding Attributes (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Attributes Page

Use the Attributes page (RC\_ATTR\_CASE) to add user-defined information to the case.

## Navigation

- Support, Search Cases, Case, Attributes
- HelpDesk, Search Cases, Case, Attributes
- HR HelpDesk, Search Cases, Case, Attributes
- Analyst Service Center, Search Cases, Case, Attributes

## Image: Attributes page

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

The screenshot displays the 'Case' page in a CRM application. At the top, it shows the date and time (08/19/2009 8:30:23AM PDT) and a 'My Time Zone' dropdown. Below this is a toolbar with buttons for 'Save', 'Print', 'Spell Check', '360-Degree View', '360-Degree Search', and 'Personalize'. The main content area is divided into two columns. The left column displays 'Case ID 273', 'Customer Cady Montgomery', 'Summary Refrigerator condensor needs to be clean...', and 'Open Cases 2'. The right column displays 'Status Open - New Case', 'Contact Fred Albright', 'Contact Method 651/785-6687(2834)', and 'Customer Value Gold ★★★★★'. Below this is a horizontal tab bar with tabs for 'Tasks (0)', 'Case History', 'Related Cases (0)', 'Related Actions (0)', 'Interested Parties (0)', and 'Attributes (2)'. The 'Attributes' tab is selected, showing a 'Complaint' section with a 'Nature of Complaint' text box and a 'Complaint Details' text area. At the bottom, there are four buttons: 'Save Case', 'Find Solutions', 'Escalate Case', and 'Match Cases', followed by an 'Audit History' section.

Select or enter the information that you want to add to the case.

See "Understanding Attributes (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Selecting, Printing, and Emailing Case Information

This section provides an overview of print case functionality and discusses how to:

- Select display options.
- Print and email case information.

## Pages Used to Select, Print and Email Case Information

Page Name	Definition Name	Navigation	Usage
Print Case	RC_CASE_PRINT_VIEW	Click the Print button from the case toolbar.	Print and email case information.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Case - Display Options	RC_PRINT_OPTIONS	Click the Change Display Options link on the Print Case page.	Change print options.

## Understanding the Print Case Functionality

Because certain case data can be considered proprietary information, the PeopleSoft system provides the ability to select or deselect certain fields to display or not display on the Print Case page and in the email attachment.

When the user initiates an email action, the system prepares the attachment behind the scenes and automatically sends it to the attachment server without user intervention. The system formats the attachment to display in an arrangement and style that is very similar to the Print Case output.

The system saves the attachment, which is in HTML format, with a unique filename on the attachment server associated with correspondence management. The filename that is displayed to the user on the email page is *Case NNNN Details*.

## Case - Display Options Page

Use the Case - Display Options page (RC\_PRINT\_OPTIONS) to change print options.

### Navigation

Click the Change Display Options link on the Print Case page.

### Image: Case - Display Options page

This example illustrates the fields and controls on the Case - Display Options page.

Clear or select the check boxes and radio buttons associated with the information that you want to print or email. Click OK. The system returns you to the Print Case page.

You can only print or email the sections that are listed on the Case - Display Options page. While the following sections are part of the Case component, the PeopleSoft system does not include these sections

on the Case - Display Options page and you, therefore, cannot print or email this information using the print case functionality that the PeopleSoft system delivers:

- Related Cases
- Interested Parties
- Attributes
- Case History
- Billing

## **Print Case Page**

Use the Print Case page (RC\_CASE\_PRINT\_VIEW) to print and email case information.

## Navigation

Click the Print button from the case toolbar.

### Image: Print Case page (1 of 2)

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

Case ID 220491		Status
		Open - New Case
<a href="#">Change Display Options</a>		<a href="#">Email</a>
<b>Customer Information</b>		
<b>Name</b>	Gregory Keith	
<b>Site</b>		
<b>ID</b>	ADCRM1000	
<b>Employee Number</b>		
<b>Location</b>		
<b>Physical Location</b>		
<b>Reported By</b>	Gregory Keith	
<b>Alternate Contact</b>		
<b>Contact Method</b>	HCMGENUser1@ap6023fems.us.o racle.com	
<b>Department</b>		
<b>Problem Information</b>		
<b>Summary</b>	How can I obtain a replacement Campus ID card?	
<b>Description</b>	because original was lost, stolen, or damaged	
<b>Case Information</b>		
<input type="checkbox"/> <b>Global Case</b>	<b>Category</b> Residential Life	
<input type="checkbox"/> <b>Secured Case</b>	<b>Priority</b> Low	
<b>Business Unit</b> Great Lake University	<b>Impact</b>	
<b>Case Type</b> Student Services	<b>Urgency</b>	
<b>Status</b> Open - New Case	<b>Severity</b>	
<input type="checkbox"/> <b>Resolved by First Contact</b>	<b>Source</b>	
<b>Provider Group</b> Residential Life	<b>Agreement</b>	
<b>Assigned To</b> Amanda Newman	<b>Agreement Details</b>	
<b>Product Group</b>	<b>Response Met</b> Not Applicable	
<b>Product ID</b>	<b>Restore Met</b> Not Applicable	
<b>Description</b>	<b>Entitled Response</b>	
<b>Problem Type</b>	<b>Actual Response</b>	
<b>Serial Number</b>	<b>Entitled Restore</b>	
<b>Asset Tag</b>	<b>Actual Restore</b>	
<b>Installed</b> No		

**Image: Print Case page (2 of 2)**

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

Notes				
<b>Added</b> 02/10/2009 5:39PM Burt Lee				
<b>Subject</b> Replace ID Card				
<b>Details</b> Student needed replacement ID card because original was lost, stolen, or damaged				
<b>Note Type</b>				

Tasks				
There are no Tasks for this Case.				

Attempted Solutions				
ID	Description	Date Modified	Added By	Status
301404	Campus ID cards are needed to access campus residences as well as use dining services. You must purchase a replacement ID card on the lower level of the Student Center building. You will need to bring a picture ID such as a State Drivers License or State ID card.	02/10/2009 5:39:38PM PST	Burt Lee	Successful Resolution

Related Actions				
No related actions have been added.				

Audit History				
<b>Created</b> 02/10/2009 5:39PM PST		<b>By</b> SAMPLE	Burt Lee	
<b>Modified</b> 02/10/2009 5:39PM PST		<b>By</b> SAMPLE	Burt Lee	
<b>Closed</b>		<b>By</b>		

Email

To print case information, click File, Print, Print from the toolbar on your browser page.

To email case information, click the Email button at either the top or the bottom of the page. The system displays the Outbound Notification page. Any attachments associated with the case will be available on the Outbound Notification page for inclusion with the email.

See "Sending Manual Notifications From CRM Transactions (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

# Tracking Time Spent on Cases

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## Understanding Time Logs

In PeopleSoft CRM, a time log is automatically generated for every case created in the system. A case time log is prepopulated with the case's assigned agent name and its start date and time.

Time logs are stored in the PeopleSoft database for informational purposes. The time log is referenced in agreement pricing for cases where there is a prepaid agreement for a specified number of hours: the time log is used to decrement the number of remaining hours in the prepaid agreement.

You can design your own reports and processes to leverage the time data captured for each case. PeopleSoft Support and HelpDesk deliver a 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 reports for each work day (that is, start and end dates are identical), which enables the system to record the exact number of work hours per work day for reporting.

For example, you want to log time for a service activity that you just finished and it lasted three days, from 4 p.m. on June 6 through 10 a.m. on June 8. If you enter the entire period of time in one time-log entry, the system includes the nonwork hours during this time period when it calculates the total number of hours you spent on this task.

In this scenario, June 7 becomes a 24-hour work day even though you actually worked eight hours on that day. To make sure the system captures work hours accurately, log time for each work day that you spend on the task by adding rows to the task's time log.

---

### Related Links

[PeopleSoft CRM Call Center Reports: A to Z](#)

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## Managing Time

This section discusses how to log time that is spent working on cases.

## Page Used to Manage Time

Page Name	Definition Name	Navigation	Usage
Manage Time	RF_TIME	<ul style="list-style-type: none"> <li>Support, Time, Manage Time, Manage Time</li> <li>HelpDesk, Time, Manage Time, Manage Time</li> <li>Click the Time Entry button on the toolbar of the Case component of PeopleSoft Support, HelpDesk or HelpDesk for Human Resources.</li> </ul>	<p>Log the actual period of time spent to complete a case.</p> <p>Time entry links can appear under the Support or HelpDesk folder, depending on who is logged in. For example, a help desk agent will see Time under HelpDesk folder.</p>

## Manage Time Page

Use the Manage Time page (RF\_TIME) to log the actual period of time spent to complete a case.

### Navigation

- Support, Time, Manage Time, Manage Time
- HelpDesk, Time, Manage Time, Manage Time
- Click the Time Entry button on the toolbar of the Case component of PeopleSoft Support, HelpDesk or HelpDesk for Human Resources.

### Image: Manage Time page

This example illustrates the fields and controls on the Manage Time page.

**Manage Time**

Save Refresh | Search | Next | Previous | 360 360-Degree View | >> Personalize

Case ID 220500 Employee [Savana Miller](#)  
Contact

**Time** Customize Find | 1-2 of 2 Last

Time Entry Comments

Agent	Start Date	Start Time	End Date	End Time	Duration
Amanda Newman	08/19/2009	9:30AM	08/19/2009	10:50AM	1 hour 20 min.
Amanda Newman	08/20/2009	11:30AM	08/20/2009	12:00PM	30 min.
<b>Total</b>					1 hour 50 min.

Add Time

Each case is associated with only one system generated time log (each with a unique time report ID). While you cannot manually create time logs, you can, however, add rows within an existing time log. It is useful if a task spans multiple days and you want to report work time on a daily basis.



<b>Agent</b>	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).
<b>Start Date and Start Time</b>	Enter the date and time that the work began on the case. The system uses the information in the end date and time fields to calculation duration on the Summary page
<b>End Date and End Time</b>	Enter the date and time that the work ended on the case.
<b>Duration</b>	Displays the amount of time the agent entered for that specific row.
<b>Add Time</b>	Click to add a new row that you can use to enter additional time.
<b>Return to Case</b>	Click to return to the associated case

### Comments

Enter any comments related to the time that you entered.

### Related Links

[Understanding Case Management](#)

"Understanding the Configurable Toolbar (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"



# Managing Credit Card Payments

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## Understanding Credit Card Processing

If your organization accepts credit cards in payment for support, you can use the Authorize Credit Card page to manage this process. This page is not available when the case is associated with an agreement where this form of payment (pay for service) is inapplicable.

See *PeopleSoft 9.2: Integration Interfaces*

This section discusses:

- Processing options.
- Credit card transactions.
- Transaction process flow.

---

**Note:** Credit card processing is relevant to PeopleSoft Support only; PeopleSoft HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education do not incorporate credit card functionality.

---

## Processing Options

Credit card processing depends on whether you use a third-party credit card authorization and payment vendor.

If you entered a merchant ID on the setup page, these conditions occur:

- The Authorize Credit Card page contains a Submit button that agents use to submit transactions.
- The Authorize Credit Card page requires you to enter information that your third-party credit card authorization and payment vendor requires.

If you did not enter the merchant ID, there are no required fields on the Authorize Credit Card page. This page does not have a Submit button. Instead, the page captures information for use with your organization's own solution for processing credit card payments.

## Credit Card Transactions

PeopleSoft Support facilitates credit card processing through integration with third-party credit card authorization and payment vendors.

Depending on how your organization has configured your credit card processing, some or all of these transaction options are available:

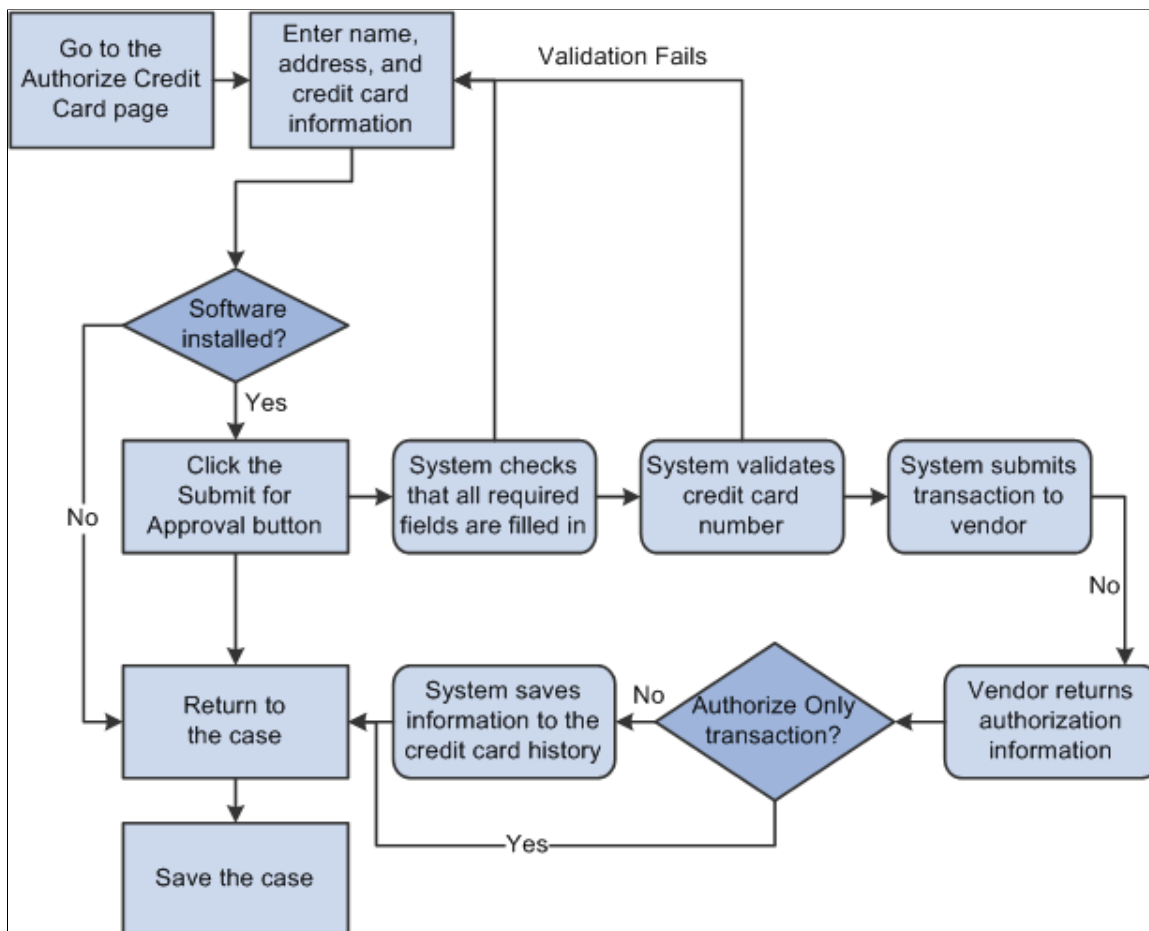
<b>Transaction Option</b>	<b>Processing</b>
Authorize Only	Verifies that the card is valid for the charge (the customer has enough credit to pay for the order, the card is not stolen, and so on). The vendor does <i>not</i> bill the credit card.
Bill Only	Bills the card without first verifying that the card is valid for the charge. Select this option if you have preauthorized the transaction and you want to submit the transaction for billing only.
Authorize and Bill	Performs both authorization and billing. The vendor charges the customer's credit card upon receiving authorization.
Credit Only	Credits the customer's credit card.

## Transaction Process Flow

The system performs all credit card validation before submitting data to the vendor, which prevents unnecessary transaction charges.

**Image: Credit card processing flow**credit card transaction process flow process flowcredit card processing

This diagram illustrates the credit card transaction process flow.



When the system validates a credit card number, it validates that:

- The credit card number is the correct length.
- The credit card number starts with a valid prefix.
- The credit card number is valid (if the Credit Card Setup page specifies the use of a check digit algorithm).

The system saves the authorization information along with the other transaction information in the credit card history once you manually save the case. This ensures that you have records of any real-time billing or credit transactions.

---

## Processing Credit Cards and Reviewing Transactions

This section discusses how to:

- Submit credit card information for authorization.
- Review credit card transactions.
- View address details.

### Pages Used to Process Credit Cards and Review Transactions

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Credit Card Information	RC_CASE_CARD_SEC	Support, Add Case, Case  Click the Credit Card Information link on the Billing page. Or click Credit Authorization link from Case page [if enabled on display template]	Submit a customer's credit card information for authorization.
Credit Card Information - Transaction Results	RC_CASE_CARD_SEC	Click the Submit Transaction button on the Credit Card Information page.	Review transaction results.
Review Electronic Card History	RB_CARD_HISTORY	Review Electronic Card History, Electronic Card History	Review credit card transactions that have been submitted for authorization.
View Contact Address Detail	RB_CARD_ADDR	Click the Contact Address link on the Review Electronic Card History page.	Review the address information that was used to process the credit card transaction.

### Credit Card Information Page

Use the Credit Card Information page (RC\_CASE\_CARD\_SEC) to submit a customer's credit card information for authorization.

## Navigation

Support, Add Case, Case

Click the Credit Card Information link on the Billing page. Or click Credit Authorization link from Case page [if enabled on display template]

### Image: Credit Card Information page

This example illustrates the fields and controls on the Credit Card Information page.

**Credit Card Details**

**Credit Card Information**

☐ Credit Card on File

Credit Card No cards on file. [Edit](#) \*Phone

Verification Number  \*Email Address

☒ New Credit Card

\*Card Type VISA

\*Card Number 4111111111111111

\*Expires 04 - April 2012

\*First Name Gabrielle

\*Last Name Sanchez

Name on Card Gabrielle Sanchez

Verification Number XXX

\*Email Address gsanchez@healthcon.com

\*Phone 408/998-7146

+ ☐ Save on File [Enter New Address](#) [Edit](#)

\*Address 526 South Street, San Jose, C

**Transaction Details**

\*Amount 320.00 \*Currency USD

Transaction Type Authorize

[Submit Transaction](#) [Return to Case](#)

This page is also used in the Service Order and Agreement components for credit card authorization purposes.

**Note:** For security purposes, the credit card number and the verification number are encrypted and stored in the database. After save, only the last 4 digits of the credit card number is shown. As for the verification number, it is masked with XXX, and will be removed permanently from the database after the credit card authorization process completes.

## Credit Card Information

This group box displays fields that are generally required by third-party credit card software vendors. All fields are required.

**Credit Card on File and Credit Card** Select this option if the customer or consumer has a credit card on file. Then select the card that you want to use from the Credit Card drop-down list box.

**Phone** Enter the customer's phone number.

**Email Address** Enter the customer's email address.

**New Credit Card** Select this option if the customer is using a new credit card.

<b>Save on File</b>	Select the check box if you want to save the person's credit card information.
<b>First Name, Last Name and Name on Card</b>	<p>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.</p> <p>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.</p> <p>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.</p>
<b>Card Type</b>	Select a credit card type. Values are based on the credit cards that are designated <i>Active</i> on the Credit Card Setup page and may include <i>AMEX</i> , <i>Diners Club/Carte Blanche</i> , <i>Discover</i> , <i>MasterCard</i> , and <i>Visa</i> .
<b>Card Number</b>	Enter the number of the credit card that is to be charged for the transaction.
<b>Expires</b>	Select the credit card expiration date (2-digit month and 4-digit year).
	<hr/> <p><b>Note:</b> The <i>Expires</i> field (CR_CARD_EXPYR) contains translate values for valid expiration years. You must periodically review and update this field with valid expiration year values. PeopleSoft CRM delivers values that range from 2001 to 2014.</p> <hr/>
<b>Verification Number</b>	<p>Enter the verification code of the credit card.</p> <p>This field becomes required if the Credit Card Verification Number Required option is selected on the General Options page.</p> <p>After the credit card transaction is submitted and the authorization process is completed (passed or failed), the verification number will be deleted permanently from the system in compliance with the Payment Card Industry (PCI) Security Standards Council recommendations on sensitive data storage.</p>
<b>Email Address and Phone</b>	Displays the customer's primary email address and telephone number by default.
<b>Address</b>	Displays the primary address that the system has on file for the person for whom you are executing a credit card transaction.

Other addresses that are associated with that person are also available for selection.

Confirm that the address is the billing address for the credit card, because address verification is part of the authorization process. The address format is based on the country that you enter.

Click the Enter New Address link if you want to add a new address to be used in the transaction. Click the Edit link if you want to update the currently selected address.

## Transaction Details

The options that are available depend on how your organization has configured credit card processing.

### Amount

Enter the amount that is to be authorized.

### Currency Code

Select the currency in which the credit card transaction should be calculated.

### Transaction Type

Select one of these values:

*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 Transaction

Click to validate all of the data on the page. If the system finds missing or invalid data, the system displays an error message explaining the problem. You must correct all of the errors before the approval process can be initiated.

If all validation criteria are met, clicking this button calls the business interlink. The vendor then performs the authorization, billing, and credit processing that you requested.



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**Warning!** When you submit an authorize and bill, bill only, or credit only transaction, the system saves the transaction information after the vendor returns the information. When you submit an authorize only transaction, you must save your work manually by saving the Case page. If you fail to save, the case results in an incomplete credit card transaction and you will have no record of the completed transaction in your system.

---

## Credit Card Information - Transaction Results

Access the Credit Card Information - Transaction Results page (click the Submit Transaction button on the Credit Card Information page).

### Image: Credit Card Information - Transaction Results page

This example illustrates the fields and controls on the Credit Card Information - Transaction Results page.

The screenshot shows a web page titled 'Case' with a sub-header 'Transaction Results'. Below this is a table with transaction details:

Transaction	
<b>Status</b> Authorized	<b>Code</b> 123456
<b>Date</b> 09/03/2009	<b>Reference</b> 2125198115
	<b>Request ID</b> 2520001063370008402433

Below the table is a link: [Return to Credit Card Details](#)

This page displays authorization information for the credit card transaction.

### Status

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.

**Code (credit card authorization code)** Displays the reference number for an authorized transaction.

**Date** Displays the date that the transaction was authorized.

**Reference** Displays a message regarding the authorization. For example, if a link is not working, you might see *Interlink Error*.

**Return to Credit Card Details** Click to return to the Credit Card Information page.

If you return to the case without submitting the transaction, the information still appears on the Credit Card Information page and is saved to the credit card history when you save the case, even though the transaction results fields are blank. To prevent this from happening, you can either clear all data from the Authorize Credit Card page before returning to the case or close the case without saving.

## Related Links

[Recording Billing Information](#)

"Understanding Credit Card Encryption (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Review Electronic Card History Page

Use the Review Electronic Card History page (RB\_CARD\_HISTORY) to review credit card transactions that have been submitted for authorization.

## Navigation

Review Electronic Card History, Electronic Card History

### Image: Review Electronic Card History page (1 of 2)

This example illustrates the fields and controls on the Review Electronic Card History page (1 of 2).

Review Electronic Card History	
<b>Card Information</b>	
<b>Card Owner ID</b>	Call Center
<b>Application ID</b>	PEOPLESOF2
<b>Card History</b>	
Find   View All   First   2 of 2   Last	
<b>Sequence Number</b>	2
<b>Authorization Status</b>	Authorized
<b>Authorization Date</b>	09/03/2009
<b>Authorization Code</b>	123456
<b>Credit Card Request ID</b>	2520001063370008402433
<b>Transaction Reference Number</b>	2125198115
<b>Name as it Appears</b>	Gabrielle Sanchez
<b>Credit Card Number</b>	*****1111
<b>Expiry Month / Year</b>	04 / 2011
<b>Verification Number Sent?</b>	Y
<b>Amount</b>	\$100.000
<b>Currency</b>	USD

### Image: Review Electronic Card History page (2 of 2)

This example illustrates the fields and controls on the Review Electronic Card History page (2 of 2).

<b>Phone Number</b>	408/998-7146
<b>Email ID</b>	gsanchez@healthcon.com
<b>Return Message Status</b>	Message 1: SUCCESS Message 2 Message 3
<b>Address Verification Service</b>	<a href="#">Contact Address</a>
<b>Authorization Date/Time</b>	2009-09-03-10.48.27.
<b>Modified</b>	09/03/2009 10:48AM PDT VP1

Many fields on this page are the same as for the Authorize Credit Card page. Only definitions for fields that do not correspond to similarly named fields on the Authorize Credit Card page are described here.

## Card Information

### Card Owner ID

Displays the name of the application through which the credit card transaction was processed. PeopleSoft CRM groups credit card transactions by the application from which they originated.

Use the Show previous row and Show next row buttons to scroll through the transactions for a specific PeopleSoft CRM application.

## Card History

### Sequence Number

If multiple credit card transactions are associated with a case, the sequence number differentiates the transactions.

### Verification Number Sent

Indicates if a credit card verification number was sent for this credit card transaction. The number is not displayed on this page.

### Return Message Status, Message 1, Message 2, and Message 3

Displays information regarding your authorization, billing, or credit request.

### Address Verification Service

Displays address verification results. An example is *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.

## View Contact Address Detail Page

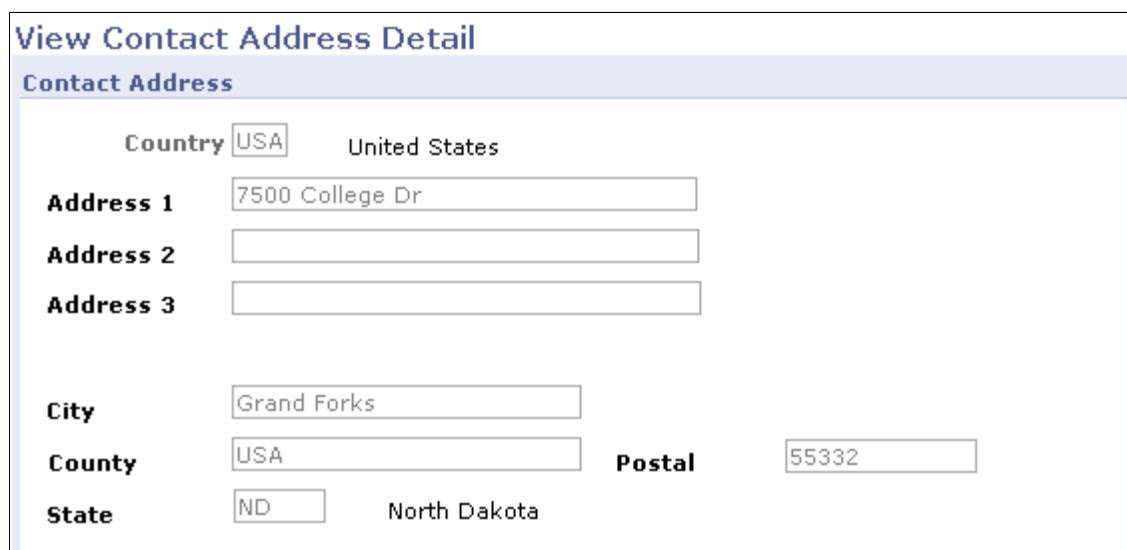
Use the View Contact Address Detail page (RB\_CARD\_ADDR) to review the address information that was used to process the credit card transaction.

### Navigation

Click the Contact Address link on the Review Electronic Card History page.

### Image: View Contact Address Detail page

This example illustrates the fields and controls on the View Contact Address Detail page.



The screenshot displays the 'View Contact Address Detail' page. At the top, the title 'View Contact Address Detail' is shown in blue. Below it, a sub-header 'Contact Address' is highlighted in a light blue bar. The form contains the following fields and values:

- Country:** A dropdown menu with 'USA' selected, and the text 'United States' displayed next to it.
- Address 1:** A text box containing '7500 College Dr'.
- Address 2:** An empty text box.
- Address 3:** An empty text box.
- City:** A text box containing 'Grand Forks'.
- County:** A text box containing 'USA'.
- Postal:** A text box containing '55332'.
- State:** A dropdown menu with 'ND' selected, and the text 'North Dakota' displayed next to it.

Use this page to review the address information used to process the credit card transaction. Click Return to go back to the Review Electronic Card History page.



# Managing Material Returns

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## 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.

We discuss this information in the documentation for understanding requisitions and understanding purchase orders.

See *PeopleSoft FSCM: Purchasing*

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

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## RMA Process Flows

Agents using PeopleSoft Support can create four types of RMAs:

- Advanced exchange
- Return-and-replace
- Repair-and-return
- Return-to-stock

### Basic RMA Processing

Regardless of RMA type, some processing steps are shared by all RMAs that are created in PeopleSoft Support:

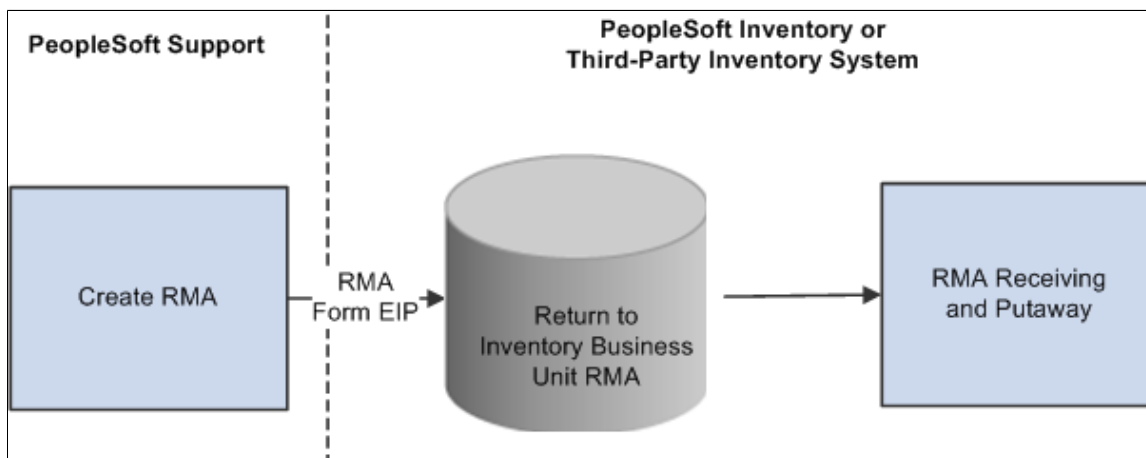
1. A customer calls the agent and requests an RMA.
2. The agent opens a new or existing case for the customer and creates an RMA in PeopleSoft Support.
3. When the agent saves the RMA, the system uses the Return Material Authorization EIP (referred to as RMA Form EIP in the diagram) to stage the RMA for processing in the inventory business unit that has been defined on the RMA as the location to send the returned material.
4. The customer physically returns the material to the inventory business unit.

5. In PeopleSoft Inventory, or your third-party inventory system, receipt of the returned material is recorded and the RMA is closed in the inventory system.

Your inventory system handles the receipt status management for RMAs.

#### **Image: Basic RMA processing flow**

This diagram illustrates the basic RMA processing flow from PeopleSoft Support through PeopleSoft Inventory or a third-party inventory system.



We discuss this information in more detail in the Financials/Supply Chain Management documentation for defining general options.

See *PeopleSoft FSCM: Application Fundamentals*

### **Advanced Exchange RMAs**

With the advanced exchange RMA type, you can create a replacement order for the customer at the time that you create the RMA. Specify the replacement item or items on the RMA line.

The replacement order can include any of the active items in your system. When you save the RMA form, the system stages the RMA in your inventory system using the Return Material Authorization EIP and creates a requisition request for the replacement order in your purchasing system using the Purchase Order Requisition EIP (referred to as PO Requisition EIP in the diagram).

The system obtains the ship to address for the customer's replacement order from the RMA form.

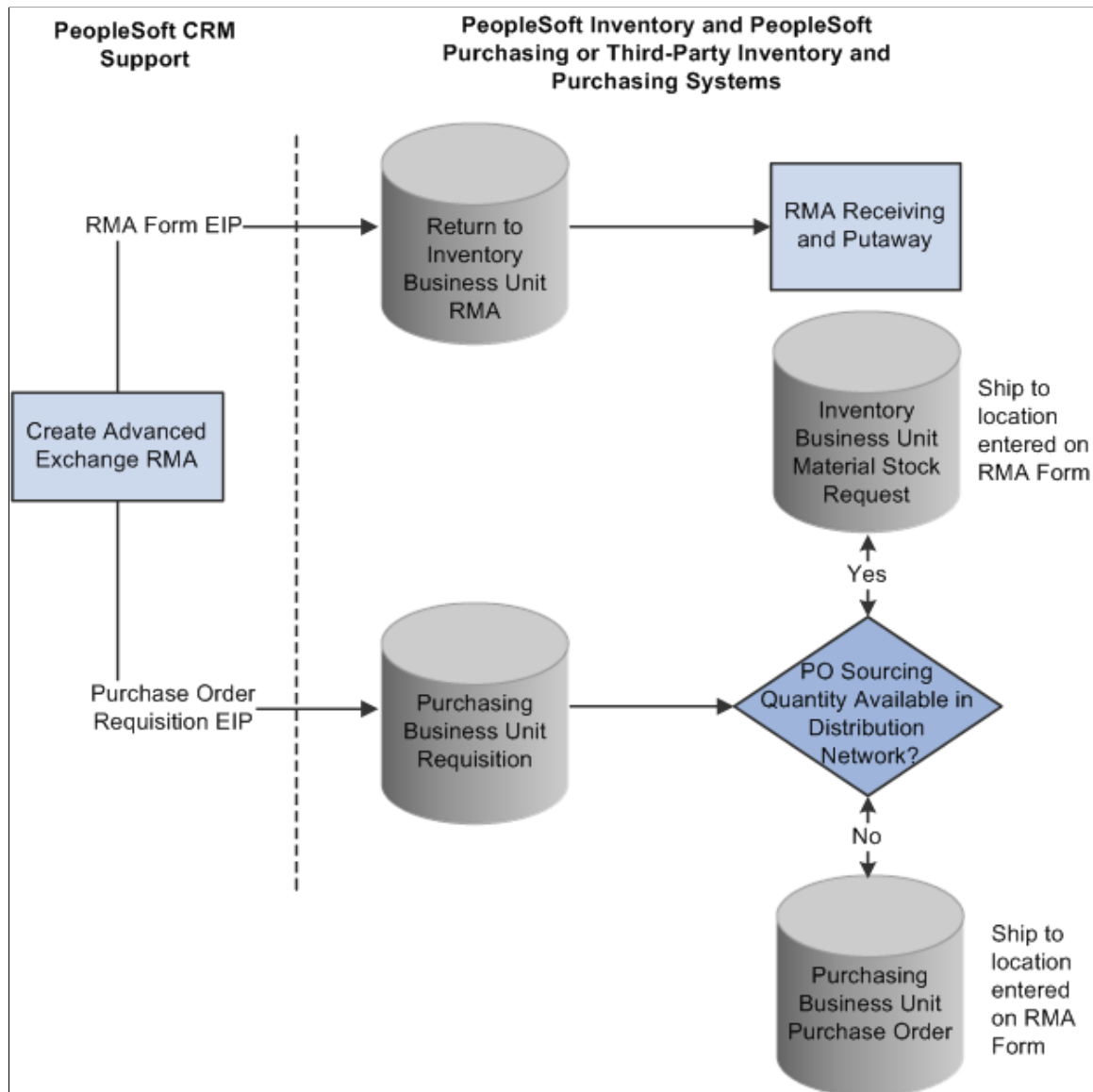
We discuss this information in more detail in the documentation for enterprise integration points, understanding the EIP catalog.



See *PeopleTools: Integration Broker Service Operations Monitor* and *PeopleTools: Integration Broker Testing Utilities and Tools*.

**Image: Advanced exchange RMA processing flow**  
**Advanced exchange RMA processing flow**  
**RMA processing flow for advanced exchange RMA**

This diagram illustrates the advanced exchange RMA processing flow.



The Purchase Order Requisition EIP enables you to requisition a replacement for the customer at the time that the advanced exchange RMA is created.

**Note:** PeopleSoft Purchasing, or your third-party purchasing system, handles the processing of the requisitions that are staged by the Purchase Order Requisition EIP. In your purchasing system, you must set processing defaults for the staged requisitions and perform any required actions to complete the ordering process.

## Return-and-Replace RMAs

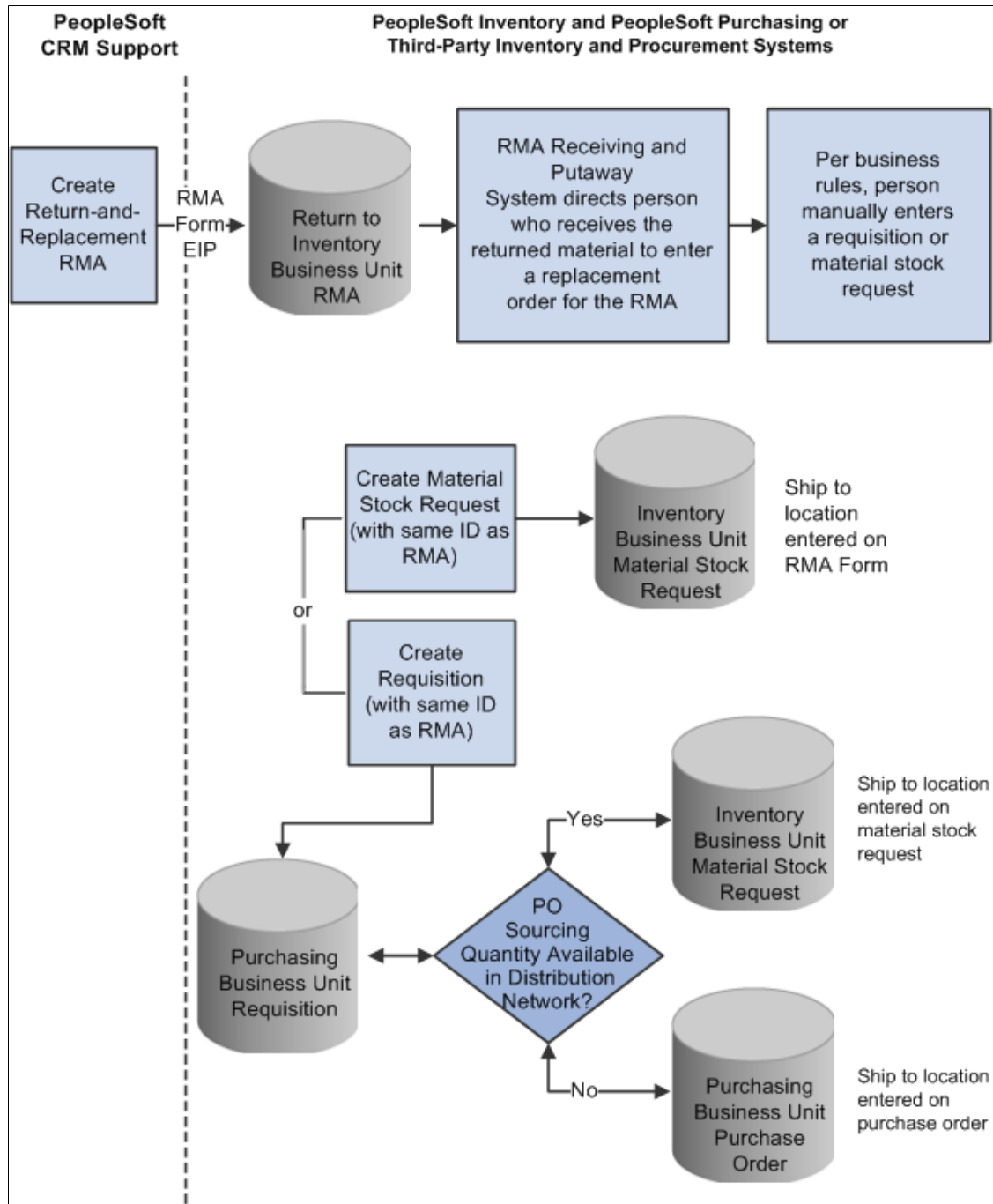
Unlike the advanced exchange RMA, orders for return-and-replace RMAs are not created until the returned material has been physically received in the location specified as the return-to business unit. Follow these steps to process a return-and-replace RMA:

1. When a person records receipt of material on a return-and-replace RMA in your inventory system, the inventory system displays a message indicating that a replacement order is required.
2. Depending on your business process rules, the person manually enters a material stock request in your inventory system or a requisition in your purchasing system to replace the customer's returned material.
3. The person receiving the returned material uses the information on the RMA, such as the customer's address, information about the item, and quantity returned, to create the replacement order.

4. To facilitate tracking of the replacement order in your inventory or purchasing systems, the same ID as the RMA should be used when the person manually creates replacement requisitions or material stock requests.

**Image: Return-and-replace RMA processing flow**  
**Return-and-replace RMA processing flow process flows**  
**Return-and-replace RMA**

This diagram illustrates the return-and-replace RMA processing flow.



For return-and-replace RMAs, replacement orders are manually created in your inventory or purchasing systems after the returned material has been physically received from the customer.

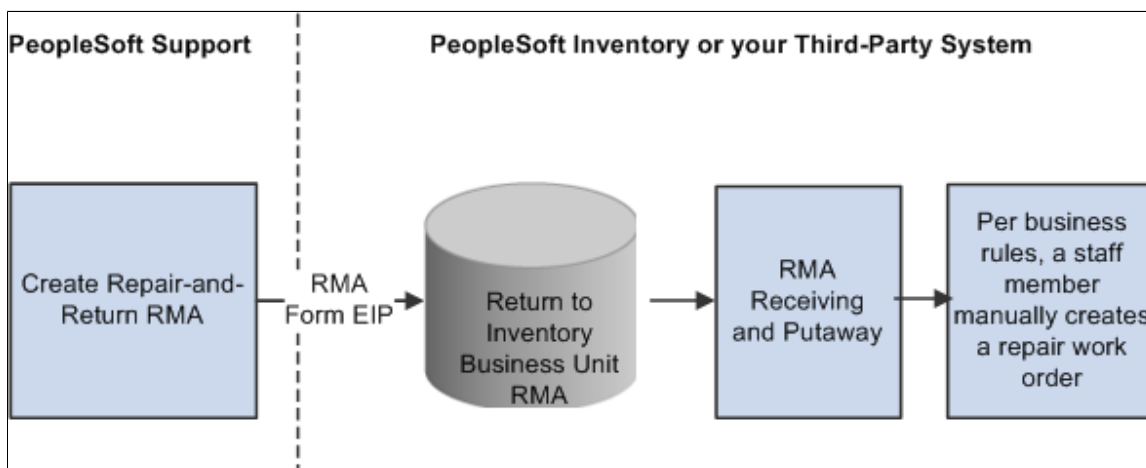
## Repair-and-Return RMAs

You create repair-and-return RMAs when a customer sends an item back to you for repair. As delivered, PeopleSoft CRM does not offer repair depot functions. However, if your business includes repair services, you can use the repair-and-return RMA option in conjunction with your business process rules. The repair-and-return RMA processing is similar to return-and-replace RMA processing:

1. A person creates an RMA for a customer in the specified return-to business unit in your inventory system.
2. A staff member, in the facility where the item needing repairs is sent, records the receipt of the RMA in your inventory system.
3. The staff member creates a work order for the repairs, according to your business rules, and delivers the item to the appropriate staff for repair work.
4. The work order should include the ship to address for the customer who appears on the RMA form and the RMA number (to facilitate RMA tracking across your enterprise).
5. The material is shipped back to the customer using the address information from the RMA when the repair work is complete.

### Image: Repair-and-return RMA processing flow

This diagram illustrates the repair-and-return RMA processing flow.



For repair-and-return RMAs, repair work orders are manually created per your business rules when the returned material is physically received from the customer.

## Return-to-Stock RMAs

You create a return-to-stock RMA for a customer who is returning material with no need for a replacement. Typically, the customer has received the wrong shipment or been shipped too much quantity. The process flow for a return-to-stock RMA is identical to the basic RMA processing flow.

We discuss this information in more detail in the documentation for receiving and putting away stock and transferring stock between business units.

See *PeopleSoft FSCM: Inventory*

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**Note:** You can create RMAs for customers who return stock for orders that they placed but then changed their minds about the order at the time of receipt. For billing purposes, use the RMA processes of your order management system to handle these cases.

---

## RMA Notifications

As delivered, PeopleSoft Support offers the RMA receipt notification workflow. You can use this workflow to notify the receiving manager and receiving agent when an RMA shipment is expected from a customer. Once the workflow is set up, the system sends your receiving managers and receiving agents a notification each time that a new RMA is saved in PeopleSoft Support.

### RMA Receipt Workflow Notifications Setup

To enable RMA notifications, you must define people in your system with receiving manager and receiving agent roles and establish their routing preferences and email addresses.

To set up RMA notification workflow:

1. Assign the receiving manager and receiving agent roles to the appropriate employees in your system.

When an RMA is created, the receiving managers and receiving agents receive notification that a receipt for returned material is expected. You associate the receiving manager or receiving agent role to a person in your system on the Roles page under User Profiles.

We discuss this procedure in the documentation for setting up user profiles.

2. Define notification routing preferences for the people assigned the receiving manager and receiving agent roles.

When an RMA is created, the notification is published as a worklist entry, an email, or both, depending on the routing preferences defined for the group member on the Workflow page accessible through User Profiles. On that page, indicate whether the person is a worklist user, an email user, or both.

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**Note:** Note that if you select both the Worklist User and Email User check boxes for the person, two notices—an email and a worklist entry—are published each time the workflow process is triggered for an RMA that is created. Define an email address for each person with an email notification preference.

---

3. Define valid email addresses for the people who receive email notifications.

For each person with an email routing preference for RMA notifications, define a primary email address in the Worker component.

---

**Note:** Person IDs defined for the worker are associated with user IDs on the User Profile page under Workforce, Search Worker or the User Profile component under PeopleTools, Security, User Profiles. For workflow notifications to work as designed, link each person in your system to one user ID only.

---

4. (Optional) Associate worklist groups with the people who are assigned receiving manager and receiving agent roles.

When an RMA is created, a worklist entry can be created for the worklist group that is established for the people who are assigned receiving manager and receiving agent roles in your system. A worklist group must first be defined on the Group Worklist Setup page.

See the product documentation for *PeopleTools: System and Server Administration*.

## Related Links

"Group Worklist Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

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# Setting Up Material Return Processing

Successful implementation of the RMA creation functionality depends on several setup steps:

1. Define inventory business units.

Define business units in your inventory system that represent the warehouses that are to receive returned material. Activate the Business Unit EIP to insert the business units that are defined in your inventory system in the BUSINESS\_UNIT\_FS table in the PeopleSoft CRM system automatically. This enables you to select the appropriate inventory business unit on the RMA Form.

We discuss this procedure in more detail in the documentation for transferring stock between business units.

See *PeopleSoft FSCM: Inventory*.

2. Synchronize item, product, and customer 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. You can configure sourcing processes in PeopleSoft Purchasing to verify the available quantity in the distribution network before creating a purchase order with an external vendor. If the quantity exists in one of the inventory business units in the defined distribution network, the system creates a material stock request to fulfill the requisition.

See *PeopleSoft FSCM: Application Fundamentals*.

4. Define requesters in PeopleSoft CRM and your purchasing system.

The requester ID represents a person or an entity that initiates a requisition request. For advanced exchange RMA lines, the system populates the Requester field with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID as necessary. However, if you integrate with PeopleSoft Purchasing, the requester ID that you select for the RMA line created in PeopleSoft Support must be a valid user ID and requisition requester in PeopleSoft Purchasing.

5. Activate the associated service operation queues.

In your PeopleSoft Support and Inventory systems, activate the Return Material Authorization service operation. For advanced exchange RMAs, activate the Purchase Order Requisition service operation in PeopleSoft Support and in your purchasing system.

6. Define problem codes in PeopleSoft CRM and reason codes in PeopleSoft Inventory.

When you create an RMA in PeopleSoft Support, you must specify a problem code. You set up problem codes for RMAs on the Problem Codes page under Set Up CRM, Common Definitions, Codes and Auto Numbering, Problem Codes. If you are integrating with PeopleSoft Inventory, the problem codes that you select for RMAs in PeopleSoft Support must match the reason codes that are established on the Reason Code page in PeopleSoft Inventory. Also, the matching reason codes in PeopleSoft Inventory must be defined with a reason type of *Return Material Authorization*. When the RMA form is created in PeopleSoft Inventory, the problem code is used as the reason code. If the reason code on the RMA form does not exist in PeopleSoft Inventory, the system logs an error when the RMA service operation is processed.

7. Create a case for a customer.

Create a case using the Case component in PeopleSoft Support. RMAs must be associated with a case in your system. You cannot create an RMA without first creating a case.

## Related Links

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

[Understanding Case Management](#)

"Integrating with PeopleSoft Financial Management Services (*PeopleSoft CRM 9.2: Integrated FieldService*)"

"Understanding Item Definition in PeopleSoft CRM (*PeopleSoft CRM 9.2: Product and Item Management*)"

"Understanding Products in PeopleSoft CRM (*PeopleSoft CRM 9.2: Product and Item Management*)"

"Business Object Relationship Modelling (*PeopleSoft CRM 9.2: Business Object Management*)"

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## Creating RMA Transactions

This section discusses how to:

- Create and view an RMA transaction.
- View the installed product hierarchy.

- Add notes.

If PeopleSoft Support is integrated with PeopleSoft Inventory and PeopleSoft Purchasing or a third-party inventory and purchasing system, you can create RMAs for customer returns using the pages in the RMA Form component or the Related Actions page in cases. You must save a case to save an RMA. Typically, an RMA is created from a case.

## Pages Used to Create RMA Transactions

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Return Material Authorization	RF_RMA_HDR	Support, Returns  Support, Add Case  Select Create RMA from the Related Action drop-down list box and click the Go button.	Create and view RMA transactions.
Returns - Installed Product Hierarchy	RF_INSTPROD_VH_SEC	Click the View Inst Product Hierarchy View Inst Product Hierarchy button button on the Return Material Authorization page.	View the installed product hierarchy for the specified customer.
Return Material Authorization - Notes	RF_RMA_NOTE	Select the Notes page on the Return Material Authorization component.	Record comments and attach files that are related to an RMA.

### Related Links

[Managing Related Actions](#)

"Understanding Installed Products (*PeopleSoft CRM 9.2: Product and Item Management*)"

## Return Material Authorization Page

Use the Return Material Authorization page (RF\_RMA\_HDR) to create and view RMA transactions.



## Navigation

Support, Returns

Support, Add Case

Select Create RMA from the Related Action drop-down list box and click the Go button.

## Image: Return Material Authorization page

This example illustrates the fields and controls on the Return Material Authorization page.

The screenshot shows the 'Returns' page with the following details:

- Navigation Bar:** Save, Search, Add RMA, Next, Previous, 360-Degree View, 360-Degree Search, >>, Personalize.
- Form Fields:**
  - RMA Number: 100300010
  - Case ID: 220426
  - Unit: APP01 - Appliances
  - Return Material Authorization (selected tab), Notes
  - Contact Information:
    - \*Case ID: 220426
    - Phone: 988-5600(650)
    - Contact: Jim Jacobs
    - Email: jimjacobsd@yahoo.com
  - Return Product Information:
    - \*Return to IBU: Appliances
    - \*RMA Line Type: Advanced Exchange
    - Site: [Dropdown]
    - Serial ID: SR1004-3001
    - Product ID: SR1004
    - \*Item ID: SR1004
    - \*Qty Returned: 1.0000
    - Requester: BLEE
    - Comments: [Text Area]
    - \*Return Date: 02/19/2006
    - \*Problem Code: Item Defective
    - \*Address: 1200 Lake Dr Circlepine MN USA
    - Lot ID: [Text Field]
    - Product Name: 18000 BTU Room Air (Grey)
    - Item Name: 18000 BTU Room Air (Grey)
    - UOM: EA
  - Replacement Item(s):
 

Replacement Item ID	Replacement Item Name	Quantity Requested	UOM
SR1004	18000 BTU Room Air (Grey)	1.0000	EA
- Footer:** Go to: View Status, Requisition Workbench.

If your implementation includes PeopleSoft Inventory, and you logged in to the portal using the single sign-on feature, you can click the View Status link to access the RMA Form page in PeopleSoft Inventory. The View Status link is disabled in Add mode. Similarly, the Requisition Workbench link appears if your implementation includes PeopleSoft Purchasing, and you logged in to the portal using the single sign-on feature. This link is active only in Update/Display mode when at least one RMA line has the RMA type *Advanced Exchange*. The Requisition Workbench link is disabled in Add mode.

### RMA Number

Displays *Next* until you click Save. Then the system issues the RMA a number.

### Case ID

The unique identifier of a case.

### Customer

Displays the name of the customer who is returning the material. The customer name is populated from the case and cannot be changed. Customer records are established in your system using the Add Company or Search Company components under Customers CRM.

---

**Note:** Before you create and save an RMA, a case must be created and a ship-to role must be defined for the customer defined on that case.

---

**Contact**

The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value.

---

**Note:** A contact is required if the specified customer is a company, but optional if the customer is a consumer.

---

**Unit**

Displays the business unit that is associated with the RMA.

**Contact Information**

This section displays information about the customer who is returning the material:

**Case ID**

The unique identifier of a case. When you create a new RMA, you must specify an existing case ID before you save the RMA. You cannot change the Case ID on an existing RMA.

**Phone**

Select the phone number that is associated with the contact or customer.

**Contact**

Enter the name of the person who requested the RMA on behalf of the customer. The system populates this field with the contact name that was entered on the case, if available, or with the name of the primary contact who is associated with the customer. You can modify this value.

---

**Note:** A contact is required if the specified customer is a company, but optional if the customer is a consumer.

---

**Email**

From the Email drop-down list box, select an email address that is associated with the customer, contact, or site.

**Return Product Information**

This section provides default information for each RMA line that you add. You can modify the information that is defined using these fields for each RMA line.

If you choose *Return to Stock* for the RMA Line Type field, at the top of the page or click the Add Return Product button, the system displays information about the product being returned to stock. If you do this, enter the appropriate information in these fields.

**Delete**

Click this button to delete the row of data that is displayed.

**Return To IBU (return to inventory business unit) Return To IBU**

Select the inventory business unit where the customer ships the returned material. In PeopleSoft Support, a default value for this field is specified for the call center business unit on the Call

	Center BU page. If PeopleSoft Inventory is installed, this is a PeopleSoft Inventory business unit.
<b>RMA Line Type</b>	<p>Displays the type of processing that is used for the returned material. Values are:</p> <p><i>Advanced Exchange:</i> Immediately creates a replacement order for the item that the customer is returning. The replacement order can be for the same item or for a different item. You can specify the replacement in the Replacement Item(s) grid. The system populates the replacement item and requested quantity using the values defined for the return item and returned quantity.</p> <p><i>Repair and Return:</i> The customer is returning an item for repair.</p> <p><i>Return and Replace:</i> The item that the customer is returning must be received before a replacement order can be created.</p> <p><i>Return to Stock:</i> The customer is returning material that was originally requested on a case that was not needed.</p>
<b>Site</b>	Displays the identification of the customer site from which material is being returned.
<b>Serial ID</b>	<p>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.</p> <hr/> <p><b>Note:</b> If you enter a value for an item that is not serial controlled or ship-serial controlled in your system, the value is removed when you save the information.</p> <hr/>
<b>Product ID and Product Name</b>	<p>Displays the identification information for the product that the customer is returning.</p> <hr/> <p><b>Note:</b> 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.</p> <hr/>
<b>Item ID and Item Name</b>	Displays the identification of the item that the customer is returning.
<b>Qty Returned (quantity returned)</b>	Displays the amount of the item that the customer is returning. For serial-controlled items, this quantity must be 1.
<b>Requester</b>	Displays the ID of the person or entity that is associated with the requisition request. The system populates this value with the default requester ID that is defined on the User Preferences - Overall Preferences page. You can modify the requester ID, as necessary. If you have implemented PeopleSoft Purchasing,

you can use the requester ID to view the status of all the requisitions that have been entered by a specific person using the Requisition Workbench.

We discuss this procedure in the documentation for reviewing requisition information.

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

---

**Important!** If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. Requesters are established on the Requester Setup page in PeopleSoft Supply Chain Management under Structure Procurement Options.

---

**Comments**

Enter notes about the RMA (optional).

**Return Date**

Displays the date that the returned item is expected to be received at the inventory business unit defined as the Return To IBU. When you add a new RMA, you can specify an estimated return date for informational purposes only. The current date is the default value for this field.

**Problem Code**

Select the entry that best describes the problem you are having with the product.

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

**Address**

Displays the ship-to address that is specified for the customer or customer site. The system populates primary ship to address that is defined for the site, if entered, or the primary ship-to address that is defined for the customer.

Displays the address associated with one of the ship-to addresses specified for the customer or customer site. When entering a new RMA, click the Override Address link to modify the address on the RMA Header Return From Address page.

When viewing an existing RMA, click the Display Address link to view the address information.

**Lot ID**

Displays the lot number of the item that the customer is returning. Lot IDs are optional for lot-controlled items.

---

**Note:** If a value is entered for an item that is not lot-controlled in your system, the value is removed when you save the information.

---

**UOM (unit of measure)**

Displays the unit by which the replacement item is measured. In most cases this will be EA for each.

## Returns - Installed Product Hierarchy Page

Use the Returns - Installed Product Hierarchy page (RF\_INSTPROD\_VH\_SEC) to view the installed product hierarchy for the specified customer.

### Navigation

Click the View Inst Product Hierarchy View Inst Product Hierarchy button button on the Return Material Authorization page.

### Image: Returns - Installed Product Hierarchy page

This example illustrates the fields and controls on the Returns - Installed Product Hierarchy page.

The screenshot shows the 'Returns - Installed Product Hierarchy' page. At the top, the title 'Returns' is followed by 'Installed Product Hierarchy'. Below this is a 'Filters' section. The 'Customer Name' is 'MMA Property Management Group'. The 'Filtered By' status is 'No additional filters'. There is an 'Additional Filters' section with three input fields: 'Installed Product ID' (containing 'INS0000013'), 'Product Name' (containing '24 in. Dishwasher 5 Cycles (St)'), and 'Site Name' (empty). Below these fields are two radio buttons: 'All Statuses' (unselected) and 'Single Status' (selected). To the right of the 'Single Status' radio button is a dropdown menu showing 'Installed'. Below the filters is a 'Refresh' button. At the bottom of the page, there are links for 'Expand All' and 'Collapse All', a 'Find' button, and pagination information '1-3 of 3'. The main content area shows a hierarchy: 'MMA Property Management Group - CRM01 301' (expanded), 'Minneapolis - 478' (expanded), and 'INS0000013 - 24 in. Dishwasher 5 Cycles (St)' (selected and highlighted in blue). A 'Return' link is at the bottom left.

See "Viewing Installed Product Hierarchies (*PeopleSoft CRM 9.2: Product and Item Management*)".

## Return Material Authorization - Notes pPage

Use the Return Material Authorization - Notes page (RF\_RMA\_NOTE) to record comments and attach files that are related to an RMA.

## Navigation

Select the Notes page on the Return Material Authorization component.

### Image: Return Material Authorization - Notes page

This example illustrates the fields and controls on the Return Material Authorization - Notes page.

Save | Search | Add RMA | Next | Previous | 360-Degree View | >> | Personalize

**RMA Number** 100300001 **Case ID** 2  
**Customer** [MMA Property Management Group](#) **Customer Value** Gold ★★★★★  
**Contact** [Fred Albright](#) **Unit** US200 - CRMCO APPLIANCES

Return Material Authorization | Notes

Notes Summary Customize | Find | View All | First 1-2 of 2 Last

Select	Subject and Details	Attachment(s)	Added By	Date Added
<input type="checkbox"/>			Stu Marx	08/19/2009 9:59AM
<input type="checkbox"/>	<a href="#">Air Control valve is defective</a> Air control valve needs to be replaced.		Stu Marx	08/19/2009 9:51AM

☐ Check All / Clear All

|

Add a Note

Added On 08/19/2009 9:59AM Stu Marx Start Date  End Date

\*Subject

Details

See "Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

# Managing Assets

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## Understanding Asset Management

This section discusses:

- Asset management functionality.
- Asset related actions.
- Link definition setup.

---

**Note:** Asset management is relevant only to PeopleSoft HelpDesk; PeopleSoft Support and HelpDesk for Human Resources do not incorporate asset management functionality into their applications.

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## Asset Management Functionality

Asset management provides organizations with the ability to gather information about the hardware and software that is used over their network. The system can also detect the location of personal computers on the network.

Asset management offers these benefits:

- Provides foundation data for effective troubleshooting.
- Facilitates planning for upgrades.
- Helps control the total cost of ownership.
- Helps to accurately determine how much has been invested on a client system.
- Increases company control and security.

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**Note:** PeopleSoft Helpdesk does not currently provide any mechanisms to detect hardware and software assets from within the PeopleSoft CRM applications. You must integrate with a third-party application for asset discovery or remote control of technology assets.

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## Asset Related Actions

After you set up an integration with a third-party asset management system, agents can perform these functions from the Case page or Case toolbar in PeopleSoft HelpDesk:

- Asset Administrator  
Execute web administrator actions.
- Asset Summary

Run an ad hoc asset discovery process to verify configuration details of a specific asset.

- Remote Control

Execute a remote control process so a help desk agent can remotely take control of an employee's desktop to resolve a problem.

- Software Delivery

Perform software delivery related actions

## Link Definition Setup

The PeopleSoft system delivers four link definitions that appear on the Case page in the Related Action drop-down list box:

- Asset Administrator
- Asset Summary
- Remote Control
- Software Delivery

Portal Crefs (content references) are set up on the Content Ref Administration page in PeopleSoft PeopleTools (select PeopleTools, Portal, Structure and Content, Hidden Crefs. Then click *Asset Administrator*, *Asset Summary*, *Remote Control*, or *Software Delivery*).

Link definitions are set up in PeopleSoft CRM on the Link Definition page (select Set Up CRM, Product Related, Call Center, Link Definition). Click the RELA (related actions) category.

On the Link Definition page, the Field Name in the Search Keys grid is set to *cfResourceIdentifier*.

Additionally, the PeopleSoft system selected the Solvable check boxes for all four link definitions. However, the Self-Service check boxes are not selected for any of the link definitions. The term *Serial Number* is associated with three link definitions (Asset Summary, Asset Administrator, and Remote Control).

At runtime, the system resolves the *Serial Number* term and adds it to the URL string. For example, the Asset Summary related action generates this URL: `http://209.17.27.128/<path to third party asset system>&cfResourceIdentifier=2UB234345`

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**Note:** You may need to update the Portal CREF information to point to the correct URL based on your environment.

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

## Related Links

[Understanding Link Setup](#)



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## Prerequisites for Managing Assets

Before you can access your asset management application from PeopleSoft HelpDesk, you must:

- Install a third-party asset management application.
- Install the third-party software on the computers that need to be discovered.
- Install the third-party remote control software on the computers that need to be remotely controlled.

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**Note:** Refer to your third-party vendor's documentation or ask your consultant for advice on setting up an integration with PeopleSoft CRM.

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## Common Elements Used to Manage Assets

This section discusses common elements used to manage assets.

### Terms

These terms are used throughout this documentation:

<b>Asset</b>	Any technology device, such as a computer, peripheral, or router.
<b>Remote Control</b>	The ability to remotely take control of a computer system.
<b>ITAM</b>	Information Technology Asset Management.

---

## Managing Assets from the Case Page in PeopleSoft HelpDesk

This section discusses how to:

- Access the Asset Administration application.
- Access the Asset Summary process.
- Access the Asset administrator.
- Access the Remote Control action.
- Access the Software Delivery application.

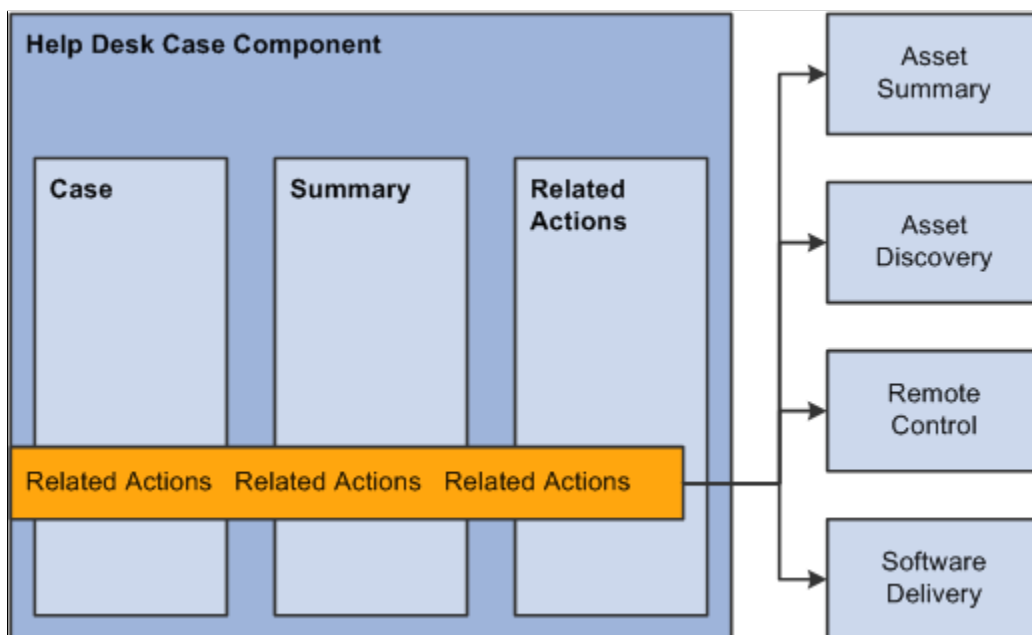
### Accessing the Asset Administration Application

Once an agent has opened a case for an employee, he or she can use the Related Actions drop-down list box on either the Case page, the Summary page, or the Related Actions page to access the asset management pages in your third-party asset management system.

**Note:** PeopleSoft CRM may not integrate with *all* third-party asset management systems, and PeopleSoft cannot guarantee that it will work with your particular third-party applications. PeopleSoft systems support frameworks for which you can open a URL and pass in parameters via the URL. Please ask your consultant for advice on setting up an integration from your third-party asset management system to PeopleSoft CRM.

### Image: Access to Asset Administration from the PeopleSoft HelpDesk component pages

This graphic illustrates how an agent can access the third-party asset management system from the PeopleSoft HelpDesk application.



## Accessing the Asset Summary

From the Case page in PeopleSoft HelpDesk, agents can run an Asset Summary process to verify configuration details of a specific asset. Using a third-party asset discovery application, this feature also assists help desk agents in performing asset discovery.

The Asset Discovery process gives help desk agents the ability to get the baseline information about the user's asset, which helps agents resolve issues.

To identify an asset on the network:

1. The agent navigates to the help desk case.
2. The agent fills in the required information as well as the asset tag information, saves the case, and then selects *Asset Summary* from the Related Actions drop-down list box or the toolbar.
3. The agent then clicks Go to perform the action.

PeopleSoft CRM passes the serial number information to the third-party application in the URL. If the agent performs the Asset Summary action and the Serial Number field is not populated, the system displays an error message. Once the system performs the Asset Summary action, the system creates a record in the Related Actions grid. The system displays the word *Performed* in the Status field in the

Related Action Summary grid on both the Summary page and the Related Actions page in the Case component.

The asset information retrieved is not transferred back to PeopleSoft CRM. Once an agent has access to the third-party application, they can locate the hardware configuration, installed software, specific network information, and the services that are running on the user's desktop.

## Accessing the Asset Administrator

From the Case page in PeopleSoft HelpDesk, agents can select *Asset Administrator* from the Related Actions drop-down list box and then click Go to transfer to the third-party asset administration application.

## Accessing Remote Control

From the Case page in PeopleSoft HelpDesk, agents can take control of a user's machine to troubleshoot problems by initiating the Remote Control process. Using this feature, help desk agents can effectively resolve an employee issue involving their computer equipment.

Once an agent performs the Remote Control action, the system creates a record in the Related Action Summary grid. The control is then transferred to the asset management application, where an agent can remotely control a user's desktop using the remote control features provided by your third-party vendor.

Generally, remote control software lets the local computer take full operational control of a remote computer, including the ability to launch applications or change system settings.

## Accessing Software Delivery

From the Case page in PeopleSoft HelpDesk, agents can select *Software Delivery* from the Related Actions drop-down list box and click Go. This action launches your third-party software delivery application, which is used to install software on various identified assets.

The software delivery application enables agents to efficiently deliver software to desktops, laptops, and servers through intelligent network devices.

Once the agent performs the action, the system creates a record in the Related Action Summary grid on both the Summary page and the Related Actions page in the Case component.

---

## Adding and Reconciling Installed Assets

This section provides an overview of installed assets and discusses adding installed assets for PeopleSoft HelpDesk.

### Pages Used to Add and Reconcile Installed Assets

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Installed Assets	RF_INST_PRODUCT	HelpDesk, Installed Assets, Installed Assets	Create installed assets in the PeopleSoft CRM database.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Asset Reconciliation	RF_ASSET_RECON	HelpDesk, Asset Reconciliation, Asset Reconciliation	Display all possible entries from PeopleSoft CRM that were matched to entries in PeopleSoft Financials. Users can update the data that was entered in PeopleSoft CRM with data that existed in PeopleSoft Financials for the same asset.

## Understanding Installed Assets

The Installed Assets feature enables IT asset information to be shared between the Asset Repository Module (ARM) in PeopleSoft Financials and installed products in PeopleSoft CRM. For a PeopleSoft CRM implementation, ARM is considered the master data source for asset information.

PeopleSoft HelpDesk requires a configuration option at the setID level, which determines whether integration to the ARM is used. This option appears under the navigation Set Up CRM, Product Related, Installed Product, Configuration.

The Integration Options group box and the Enable Asset Integration with PeopleSoft Financials field appear on this page. If you select the check box for this field, the synchronization between the two databases is in effect.

IT asset information from PeopleSoft Financials is published to PeopleSoft CRM as an initial full data synchronization. Subsequent changes made to IT asset data in the ARM triggers an incremental synchronization that is published to update installed product information.

Likewise, any changes made to installed products asset data in PeopleSoft CRM triggers an incremental synchronization that is published to update the PeopleSoft Financials asset information.

The system evaluates data coming from PeopleSoft Financials to PeopleSoft CRM to see if a corresponding installed asset entry already exists, or whether it represents a totally new asset. In the later example, a new entry is created in PeopleSoft CRM. If a possible, but not definite, match exists, the system sends the result to a reconciliation table for analysis by an agent. The agent decides to either update an existing PeopleSoft CRM entry or create a new entry.

---

**Note:** The system checks the mapping table first to determine the product ID since a default product ID should always exist in the mapping table (even when no matches exist on the asset subtype, manufacturer, and model data). If no mapping table entry is found, the system derives the product ID from the item ID. The item ID would be used only in cases when no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

---

### Related Links

"Understanding Hardware Asset Information Mapping and Reconciliation (*PeopleSoft CRM 9.2: Product and Item Management*)"

## Installed Assets Page

Use the Installed Assets page (RF\_INST\_PRODUCT) to create installed assets in the PeopleSoft CRM database.

## Navigation

HelpDesk, Installed Assets, Installed Assets

### Image: Installed Assets page (1 of 2)

This example illustrates the fields and controls on the Installed Assets page (1 of 2).

**Installed Assets**

Save | Search | Add Install Product | Next | Previous | >> | Personalize

SetID ITHD1  
Installed Product ID IHD10003  
Product Compass Notebook PC with DVD

Employee Douglas Lewis  
Asset Department Western Sales Region  
Asset Location

Installed Product | Attributes | History

**Owner Information**

Asset Owner  
☒ Employee ☐ Department ☐ Location ☐ None

Employee Douglas Lewis

Asset Department Western Sales Region

Asset Location

Asset Contact

Show Details

**Status**

*Status	Quantity	UOM
Installed	1.0000	EA

Add Status

**Asset Information**

Main | More

Product Group Computer Hardware

\*Product ID IT1026

Description Compass Notebook PC with DVD

Item ID IT1026

Item Description Notebook P

Serial ID

Asset Tag GBI02-IT1026

Install Type Sold

Date Installed 03/01/2004

### Image: Installed Assets page (2 of 2)

This example illustrates the fields and controls on the Installed Assets page (2 of 2).

**Warranty Information**

Warranty Name BASIC-ITHD

Status Active

Start Date 03/01/2004

End Date 03/01/2005

**Purchase Information**

Purchase Order

Order ID

Purchased From

Ownership

Authorization Code

External Order ID

Purchased From Contact

Sales Representative

**Operating System**

Operating System

Network

Platform

Version

User Interface

Environment

**Audit History**

Created	By	Modified	By
03/19/2004 3:57PM PDT	JDILLON	01/14/2008 6:05AM PST	SAMPLE

Joe Dillon

Burt Lee

For instructions about using the Installed Assets page, refer to the section below.

## Related Links

"Managing Installed Products (*PeopleSoft CRM 9.2: Product and Item Management*)"

## Asset Reconciliation Page

Use the Asset Reconciliation page (RF\_ASSET\_RECON) to display all possible entries from PeopleSoft CRM that were matched to entries in PeopleSoft Financials.

Users can update the data that was entered in PeopleSoft CRM with data that existed in PeopleSoft Financials for the same asset.

### Navigation

HelpDesk, Asset Reconciliation, Asset Reconciliation

### Image: Asset Reconciliation page

This example illustrates the fields and controls on the Asset Reconciliation page.

### Asset Reconciliation

Select Match or Create New

Serial ID A43-22342

Department Human Resources

Tag Number

Location

Employee ID KU0015

Product Compass Notebook PC with DVD

Possible Installed Asset Matches							Customize   Find   View All   [Grid Icon]   First 1-2 of 2 Last
	Serial ID	Asset Tag	Employee	Department	Location	Product ID	Description
<input type="radio"/>		GBI02-IT2037	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD
<input type="radio"/>		GBI02-IT1026	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD

For instructions about using the Asset Reconciliation page, refer to the section below.

## Related Links

"Mapping and Reconciling Asset Information (*PeopleSoft CRM 9.2: Product and Item Management*)"





# Understanding Asset Lifecycle Management (ALM) for CRM HelpDesk

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## CRM Asset Lifecycle Management Business Processes

Asset Lifecycle Management (ALM) expands agent and administrator asset management business capabilities through integration with PeopleSoft Financials and third-party asset discovery and control systems.

Using ALM, asset data administrators can:

- Increase control and security of asset data.
- Plan system upgrades more easily.
- More effectively manage the system's total cost of ownership.

Using ALM and your third-party system, help desk agents use case page actions to:

- Run an ad hoc asset discovery process to verify configuration details of a specific installed asset.

Accessed using the Asset summary action.

- Remotely control an employee's desktop to resolve a problem.

Accessed using the Remote control action.

- Browse inventory, manage product ads and packaging, and create and manage queries and notifications.

Accessed using the Asset administrator action.

- Distribute software to the enterprise.

Accessed using the Software delivery action.

---

## Asset Management Functionality

Asset management provides organizations with the ability to gather information about the hardware and software that is used over their network. The system can also detect the location of personal computers on the network.

Asset management offers these benefits:

- Provides foundation data for effective troubleshooting.

- Facilitates planning for upgrades.
- Helps keep the total cost of ownership under control.
- Helps to accurately determine how much has been invested in a client system.
- Increases company control and security.

---

**Note:** PeopleSoft HelpDesk does not currently provide any mechanisms to detect hardware and software assets from within its CRM applications. You must integrate with a third-party application for asset discovery or remote control of technology assets.

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### Related Links

"Understanding Installed Products (*PeopleSoft CRM 9.2: Product and Item Management*)"

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## Integration Architecture and Data Flow

Asset Lifecycle Management is based upon the sharing of information technology (IT) asset information between the Asset Repository Module (ARM) in PeopleSoft Financials and installed products in PeopleSoft CRM. For a PeopleSoft CRM implementation, the ARM is considered the master data source for asset information.

IT asset information from PeopleSoft Financials is published to PeopleSoft CRM as an initial full data synchronization. Subsequent changes made to IT asset data in the ARM triggers an incremental synchronization that is published to update installed product information.

Likewise, any changes made to installed product asset data in PeopleSoft CRM triggers an incremental synchronization that is published to update the PeopleSoft Financials asset information.

The system evaluates data coming from PeopleSoft Financials to PeopleSoft CRM to determine whether a corresponding installed asset entry already exists, or whether it represents a new asset. If there is a definitive match, the CRM installed asset entry is automatically updated with the information from the corresponding Financials entry. If there is a possible, but not definite match, the result is sent to a reconciliation table for analysis by an agent, where he or she makes the decision to either update an existing PeopleSoft CRM entry or create a new entry. If the data represents a new asset, a new entry is created in PeopleSoft CRM.

All Financials entries of Asset\_Type 010 (IT-Hardware) are added to the CRM installed asset table when the full sync is performed (COPY\_IT\_ASSET). Subsequent additions and updates to the Financials asset repository data for Asset\_Type 010 entries are thereafter sent to CRM for incremental synchronization.

---

## Understanding Installed Assets

This section discusses system management of new and updated data in the integrated system.

## Identifying a Financials Asset in CRM

The CRM Installed Product table requires a Product ID for every Installed Asset. This enables users to see the kind of asset that is being referred to in the system. Since neither Product ID nor Inventory Item ID are required for entries in the Financials Asset table, it is important that CRM installed product table entries are assigned a Product ID.

The CRM system assigns Product IDs according to the Product Mapping table.

---

**Note:** PeopleSoft Financials assets do not store product data, but product ID is a required attribute for CRM installed assets. Therefore, a mapping table specifies the Product ID that CRM should use to create a new entry from Financials asset data. The administrator can add entries to the mapping table to link specific combinations of asset subtype, manufacturer, and model values from Financials with a particular CRM Product ID. Additionally, a default entry is required in the CRM mapping table (designated by just a Product ID value with no subtype, manufacturer, or model values). The CRM system uses the default to create installed asset entries if the mapping table contains no match on more specific combinations of subtype, manufacturer, and model values.

The system checks the mapping table first to determine the product ID since there should always be a default product ID for use in the mapping table (even when there are no matches on the asset subtype, manufacturer and model data). If no mapping table entry is found, the system derives the product ID from the item ID. Thus, the item ID is used only in cases where no mapping table exists for the setID. Not having a mapping table for the setID, however, would constitute an erroneous data setup.

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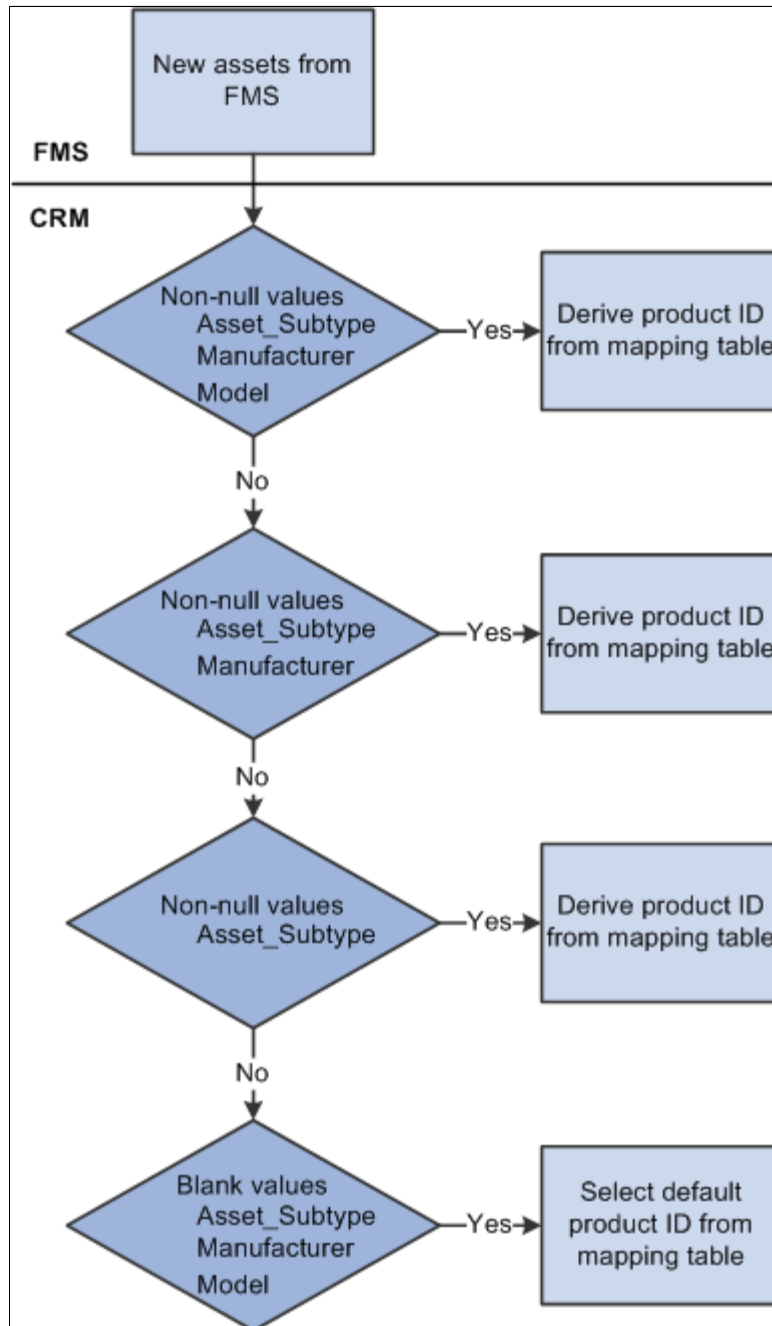
### Assignments by Matching Attribute Values

Ideally, each combination of Financials Asset\_Subtype, Manufacturer, and Model corresponds to a CRM product, and each will map to an asset that can conceivably be returned by the Financials system

(including the discovery process run on the Financials system). This enables a meaningful CRM product to be associated with each type of Financials asset.

### Image: Assigning Product IDs in CRM

This graphic illustrates how a Product ID is determined for a new asset in the CRM system.



When receiving information on a new asset from the Financials system, the CRM system checks the Financials Asset table for a match on non-null values for the Asset\_Subtype, Manufacturer, and Model fields. If there is a match, the CRM system uses the corresponding Product from the mapping table to create the new installed asset on the CRM system. If there is no match for the three fields, a match will be attempted on Asset\_Subtype and Manufacturer. If a match is found here, the corresponding Product\_ID will be used. If no match is found on these two fields, a match will be attempted only on Asset\_Subtype.

If no match is found on this field, a match will be attempted just on blank values for Asset\_Subtype, Manufacturer, and Model (this type of row will correspond to a “default” Product\_ID).

---

**Note:** A *SaveEdit* error on the mapping page requires a value for Manufacturer if a value for Model is present on that row. In addition, this SaveEdit error requires that the user enter a single “default” value specifying a Product that should be used when no other match applies. This helps ensure that CRM Products can be identified and used for any asset entry that comes from Financials.

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As already mentioned, the user ideally would set up data so that the assets sent from Financials (Asset type of IT-Hardware) have values for Asset Subtype, Manufacturer, and Model, and ensure that each of these combinations is mapped to a distinct Product on the mapping page. This would involve setting up the appropriate Asset Subtypes and Profiles on the Financials side, and the appropriate Products and product mapping setup page on the CRM side. Providing a “default” Product ID as described above ensures that a Product ID can always be found for use in the CRM Installed product table. This is required since the CRM Installed Product table requires a Product ID value for each of its entries.

---

**Important!** Before adding data to the Product Mapping page, the user must run the *Manufacturer\_Fullsync* and *Copy\_AM\_Subtype* full synchronizations. Synchronizations are discussed further in Chapter 2, Setting Up Integration and Data Transfer, “Setting Up the Mapping Table.”

---

## Updating CRM Asset Data With New Asset Information from Financials

When asset data is sent from Financials to CRM, the CRM installed asset table is updated with the corresponding asset data. The identification logic involves filtering data attributes to find matches between Financials and CRM. The logic must account for definite positive matches, assumed positive matches, and ambiguous match results.

### Positive Matches

This table depicts the conditions that result in the three possible update outcomes when the CRM system identifies a match of one or more of the four asset table values in the Financials asset data:

<b>Required Match Conditions</b>	<b>CRM Update Outcomes</b>			
<b>Serial ID</b>	<b>Business Unit</b>	<b>Asset ID</b>	<b>Installed Product ID</b>	
	Match*	Match*		The CRM data for that row is updated with all the values from Financials. This may occur when data for an asset has previously been received from Financials by CRM and a change is subsequently saved and published by Financials.

<b><i>Required Match Conditions</i></b>	<b><i>CRM Update Outcomes</i></b>			
<b><i>Serial ID</i></b>	<b><i>Business Unit</i></b>	<b><i>Asset ID</i></b>	<b><i>Installed Product ID</i></b>	
			Match	<p>The CRM data for that row is updated with all the values from Financials. This may occur when data for an asset was created by CRM and sent over to Financials and a change is subsequently saved and published by Financials.</p> <p>The corresponding CRM entry would have the same Installed Product ID but would not yet have values for Business Unit and Asset ID.</p>

<b><i>Required Match Conditions</i></b>	<b><i>CRM Update Outcomes</i></b>			
<b><i>Serial ID</i></b>	<b><i>Business Unit</i></b>	<b><i>Asset ID</i></b>	<b><i>Installed Product ID</i></b>	
yes	No match*	No match*		<p>The CRM data for that row is updated with all the values from Financials. This may occur if data for the same asset has been entered independently in both Financials and CRM prior to initial synchronization.</p> <p>If data for the same asset has been entered in Financials and CRM in a prior release, the Financials entry will initially not have the key fields for the corresponding CRM entry and the CRM entry will initially not have the key fields for the corresponding Financials entry. However, if both entries refer to the same Serial ID, it can be assumed that they refer to the same actual asset.</p>

\* Both conditions must be true.

## Assumed Positive Matches

Match conditions vary depending on the asset:

- Asset Tag

If there is a match between Financials and CRM based on identical non-null values for asset tag and product, and if there is a blank value for Business Unit, Asset ID, and Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies in situations where data for the same assets already existing in Financials and CRM (but in which CRM may only have a value for Asset\_Tag, rather than Serial ID), and an update from Financials needs to be matched against the corresponding CRM entry.

- Employee and Product

If there is a single matching row between Financials and CRM based on identical non-null values for employee ID and product ID, and there is a blank value for Business Unit, Asset ID and Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies in situations where data for the same actual assets already exists in Financials and CRM, and an update from Financials needs to be matched against the corresponding CRM entry. If there is single entry in CRM that matches the assigned employee and Product, it is assumed to refer to the same actual asset, and the CRM entry will be updated.

- **Department and Product**

If there is a single matching row between Financials and CRM based on identical non-null values for Department ID and Product ID and there is a blank value for Serial ID on the CRM side, the CRM data for that row will be updated with all the values from Financials. This applies to situations where data for the same actual assets already exists in Financials and CRM (but in which CRM may only have a value for Asset\_Tag, rather than Serial ID), and an update from Financials needs to be matched against the corresponding CRM entry. If there is a single entry in CRM that matches the assigned department and Product, it is assumed to refer to the same actual asset, and the CRM entry will be updated.

## **Ambiguous Matches**

When it is not possible to unequivocally determine that the asset is definitely the same or definitely different on both systems, the data for that row is sent to a reconciliation table that the administrator can access in the CRM application. The reconciliation table lists the assets, with their attribute data, that require reconciliation with CRM entries. The administrator can open each entry to view the possible matches with existing CRM installed assets based on the matches on Product\_ID and one or more of the following: Emplid, Deptid, or Location.

The administrator can:

- Confirm that the CRM entry refers to the same asset represented by the data from Financials and update the CRM data with all the values from the Financials system.
- Specify that the Financials data does not refer to any asset on the CRM side and create a new CRM installed asset.



The asset manager reconciles ambiguous matches on the Asset Reconciliation page, shown in this figure.

### Image: Asset Reconciliation example

This example illustrates the fields and controls on the Asset Reconciliation example.

#### Asset Reconciliation

Select Match or Create New

Serial ID A43-22342

Department Human Resources

Tag Number

Location

Employee ID KU0015

Product Compass Notebook PC with DVD

Possible Installed Asset Matches

Customize | Find | View All | [Icons] | First 1-2 of 2 Last

	Serial ID	Asset Tag	Employee	Department	Location	Product ID	Description
<input type="radio"/>		GBI02-IT2037	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD
<input type="radio"/>		GBI02-IT1026	Carmichael Espinosa	Human Resources	Corporation Headquarters	IT1026	Compass Notebook PC with DVD

Merge Selected Installed Asset

Create New Installed Asset

In this example, a Financials entry for a Compass Notebook computer with Serial ID A43-22342 belonging to Carmichael Espinosa (Emplid KU0015) was received. However, the search results show two existing CRM installed assets for the same person and product. Since the CRM entries have no Serial\_ID value, it is not possible to automatically determine if either asset is the same actual asset as the Financials entry; the match results are ambiguous.

The asset manager must now conduct research on the two CRM entries to determine whether either of them does indeed represent the same asset as the new entry from Financials (serial id A43-22342). If research indicates that the actual asset represented by the first CRM entry (Asset Tag GBI02-IT2037) has a serial ID of A43-22342, then it is in reality the same asset as the entry from Financials. To reconcile the data, the manager selects the first CRM asset in the table and clicks the Merge Selected Installed Asset button, thus merging the data from the new Financials entry with that CRM installed asset entry.

On the other hand, if neither serial ID of the two CRM entries corresponds to the Financials entry, then the entry represents a different physical asset. The manager reconciles the new data by clicking the Create New Installed Asset button to create a new CRM Installed Asset entry from the data of the Financials entry, giving Carmichael Espinosa a total of three Compass Notebook installed asset entries.

With ambiguous matches, often data for the same actual assets exists in Financials and CRM (but in which CRM may only have a value for Asset\_Tag, rather than Serial\_ID) because the lack of matching unique identifiers and/or the presence of multiple potential matches prevents a positive match.

**Note:** The status value of a Financials asset does not map directly to the status of the corresponding CRM installed asset. The Financials system will only update the CRM Installed asset entry to "Installed" or "Uninstalled", depending on what transaction is being executed in Financials.

For example, whenever a user updates an asset in the Basic Add page in Financials, the status of the new or existing CRM installed asset is updated to "Installed" (stored in the system as "INS") regardless of the actual status value of the asset in Financials. Whenever a user disposes of an asset in the Financials system, the status of the corresponding CRM installed asset is set to "uninstalled" (stored in the system as "UNI").



# Creating Work Orders from Cases

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## Understanding Work Order Requests

This section discusses:

- Work order functionality.
- Integration points with PeopleSoft Financials.
- Work order descriptions and status changes.
- Relationships between work orders and cases.
- Work orders and the 360-degree view.
- Installed product history.

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**Note:** Work order requests pertain to PeopleSoft HelpDesk only; PeopleSoft Support and PeopleSoft HelpDesk for Human Resources do not incorporate work order functionality.

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## Work Order Functionality

If an agent is working on a help desk case that he or she cannot resolve, the agent can create a work order from the case to assign a technician to troubleshoot and solve the problem.

The agent creates a work order when the solution search results recommend the creation of a work order or the agent determines that he cannot resolve the case in a reasonable amount of time.

To create a work order from a case, an agent must select *Worker Order - New* from the Actions field on either the Case page, the Case - Summary page, or the Case - Related Actions page, and then click the Go button. This action takes the user to the Create Work Order page. When the agent provides the required information on the Create Work Order page and clicks the Create Work Order button, the Add Work Order Transaction message is triggered.

Once an agent creates a work order, a help desk agent can:

- Access the work order in PeopleSoft Maintenance Management from the Related Actions section on the Case - Summary page or the Case - Related Actions page.
- Receive workflow events in his or her worklist when there is a status change or description change on the work order.

If an Active Analytics Framework (AAF) status change or description change policy is activated, both email and worklist notifications are sent.

- Relate existing work orders to cases.

## Integration points with PeopleSoft Financials

The integration between IT HelpDesk in PeopleSoft CRM and Maintenance Management in PeopleSoft Financials is accomplished with application messaging using the PeopleTools Integration Broker.

The following messages are used for this integration:

### Main Messages

These are the main messages that the system uses to transfer information:

- Add/Update Work Order Transaction (SYNC\_WORK\_ORDER\_REQ)
- Add/Update Transaction Acknowledgement (SYNC\_WORK\_ORDER\_RSP)
- Key Event Change Notification (SYNC\_WM\_WO\_KEY\_EVENT)

### Setup Messages

These are the setup messages that the system uses to transfer information:

- Problem Code Tree (COPY\_PROBLEM\_TREE)
- Problem Location (COPY\_SHOP\_LOC)
- Work Order Status (COPY\_WO\_STATUS)
- Work Order Priority (COPY\_WM\_PRIORITY)

## Work Order Descriptions and Status Changes

When the work order description or status on the Work Order page changes, the system sends the Key Event Change Notification message to PeopleSoft HelpDesk.

To trigger changes to a case when its associated work order's status or description changes requires that you use AAF to create a case change policy triggered by work order status and description changes.

Use these terms to build a new policy within the Case Update Action Type:

- Work Order ID
- Work Order Summary
- Work Order Description (Task Notes)
- Work Order Status

For example, a policy can specify that when the work order status changes from *Open* to *Closed*, the system updates the case status to *Closed* and notifies the requester or sends the customer a satisfaction survey.

The Key Event Message is not, however, enabled by activating AAF policies. You must also subscribe to the Key Event message. When a user changes the status or description on a work order, the system triggers the AAF description and status changes and then publishes the Key Event message.

To create policies for work order changes:

1. Navigate to Enterprise Components, Active Analytics Framework, Policies, Manage Policies.
2. Access either the Work Order Status Change or Work Order Description Change policy.
3. Click the Activate button.

These policies represent a message display process that runs when the event type in the Key Event Change Notification message is set to a work order status change or a work order description change.

Once the message is activated, the agent can click the URL in the worklist or email notification to launch the Case Summary page for the case that is associated with the work order.

See *PeopleSoft 9.2: Active Analytics Framework*.

See "Understanding CRM Action Types (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Relationships Between Work Orders and Cases

Cases can be related to one another to create cross-referencing in a help desk knowledge base. For the same reason, correlating similar work orders is often advantageous. However, the system does not allow a work order to be related to another work order. Instead, work orders are related to each other through a case. For example, when two cases pertain to the same problem and one case has a related work order, instead of creating another work order on the second case, relate the second case to the first case by searching on the work order ID or the description.

An agent can create as many work orders per case as necessary. Conversely, an agent can create multiple cases for the same problem and work order. In this situation, the work orders can be related to each other through a *global* case that represents the other cases with the common work order. The work order the agent can relate the cases to is then associated with the common work order.

All workflow is then driven off the global case. For example, when the status of the common work order changes, email notifications are sent to agents assigned to the related cases.

When an agent creates a help desk case for an employee and determines that a work order is needed, the agent can also determine if the issue is global (for example, a network or common area printer is down). The agent can check for the existence of a global case with a related work order. AAF policies, however, do not send workflow to all related cases.

## Work Orders and the 360-Degree View

If a work order is associated with a case, agents can view the work orders on the Worker 360-Degree View page. Work orders appear as a node on a tree. For each work order status, the system displays a link and the number of work orders at that status.

When an agent clicks one of the links, the system displays all work orders with that status in a dynamic grid in the right-hand column of the page. This display includes all work orders with a specific status that are associated to cases that have been reported by the employee.

The dynamic grid contains 4 columns:

- Work Order ID
- Work Order Description

- Work Order Status
- Case ID

Help desk agents can access the work order in PeopleSoft Financials by clicking the work order ID from the 360-Degree View page in PeopleSoft CRM. The agent does not have to log in to PeopleSoft Financials to access the work order because the system uses single signon technology for access to both databases. The work order tree node only appears on the Worker 360-Degree View page.

## Installed Product History

After an agent creates a work order, the Work Order ID field appears in the Associated Cases grid on the Installed Product History page. If a case has more than one work order associated with it, the case ID is repeated on additional rows; however, the work order ID is unique. The system turns the work order ID into a link, which enables the agent to access the work order in PeopleSoft Financials through a single sign on.

---

## Creating Work Orders

This section discusses how to create work orders in PeopleSoft CRM.

### Page Used to Create Work Orders

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Work Order	RC_LINK_WO_SEC	<p>HelpDesk, Add Case, Case</p> <p>Select <i>Work Order - New</i> from the Related Actions drop-down list box and then click Go.</p> <p>HelpDesk, Search Cases, Case</p> <p>Select <i>Work Order - New</i> from the Related Actions drop-down list box and then click Go.</p>	<p>Create a work order in PeopleSoft Financials.</p> <p>You can also create a new work order from the Case - Summary page and the Case - Related Actions page using the same method described previously.</p>

### Create Work Order Page

Use the Create Work Order page (RC\_LINK\_WO\_SEC) to create a work order in PeopleSoft Financials.

## Navigation

HelpDesk, Add Case, Case

Select *Work Order - New* from the Related Actions drop-down list box and then click Go.

HelpDesk, Search Cases, Case

Select *Work Order - New* from the Related Actions drop-down list box and then click Go.

### Image: Create Work Order page

This example illustrates the fields and controls on the Create Work Order page.

**Create Work Order**

**Employee Name** Carmichael Espinosa

**Asset Tag**

**Product Description** Toshiba Tecra Series

**\*Summary** CD ROM doesn't work all the time

**Description** Seems to be a problem with the CD read/write head. Laptop can't always read CD's

**\*Problem** IT - Computers

**\*IT** Hardware

**\*Hardware** CD ROM doesn't read

**\*Service Location** Shop A, Pleasanton, USA

**Work Order Priority** Standard

[Create Work Order](#) [Cancel and Return to Case](#)

The system takes information from the Case page and displays it on the Create Work Order page for these fields: Employee Name, Asset Tag, Product Description, Summary, and Description.

**Note:** If necessary, an agent can change or add additional text to the Summary and Description fields.

### Problem

Select the problem that best describes the caller's issue.

The system may or may not display additional problem fields based on the parent-child relationships that exist between the problem codes.

The problem code fields guide an agent's choices for identifying or classifying the problem. Each level in the problem selection provides a more detailed explanation as to the type of problem being reported against the installed asset. Based on the selection, the system may display additional fields, such as Computer,

ITAM (Information Technology Asset Management) and Hardware.

The problem code you select also drives the available values for shop location, as would be the case if shops are categorized by the problem they service. This data comes from the Financials Work Management application.

The problem code that you select here drives the values that the system uses to create the work order in PeopleSoft Maintenance Management.

### Service Location

Select the location where the item will be serviced. The system pulls information in the service location drop-down list box from the Work Management Shop Location table (PS\_WM\_SHOP\_LOC2\_VW).

The service location is the location where the installed asset is sent for repair. This location can also be the where the technician is located.

### Work Order Priority

Select a value that matches the priority that you think should be given to the problem you are having.

This field is used as an override. If it is not populated, the system populates the Priority field from the work order problem code.

---

## Viewing Work Orders

This section discusses how to view work orders in PeopleSoft CRM.

### Pages Used to View Work Orders

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Case - Summary	RC_CASE_SUMMARY	HelpDesk, Search Cases, Summary	View work orders.
Case - Related Actions	RC_ASSOCIATION	HelpDesk, Search Cases, Related Actions	View work orders.
Installed Assets - History	RF_INST_PROD_HIST	<ul style="list-style-type: none"> <li>HelpDesk, Installed Assets, History, Cases</li> <li>HelpDesk, Search Cases, Case</li> </ul> <p>Click the Transfer to Installed Assets button next to the Asset Tag field.</p>	View work orders that are related to cases.



## Case - Summary Page



Use the Case - Summary page (RC\_CASE\_SUMMARY) to view work orders.

## Navigation

HelpDesk, Search Cases, Summary

### Image: Case - Summary page: Related Action Summary section

This example illustrates the fields and controls on the Case - Summary page: Related Action Summary section.

Related Action Summary				
		Customize   Find       First 1-2 of 2 Last		
Type	Summary	Status	Date Created	Added By
Work Order	<a href="#">0000000020 - CD ROM doesn't wo...</a>	Open NOW	08/28/2009 2:19PM PDT	Stu Marx
Work Order	New		08/28/2009 2:35PM PDT	Stu Marx





Related Actions

### Image: Case - Related Actions page

This example illustrates the fields and controls on the Case - Related Actions page.

Case

08/28/2009 2:32:59PM PDT

|  Print |  Spell Check |  360-Degree View |  360-Degree Search | >>

Case ID 220536



Employee ID KU0015

Summary CD ROM doesn't work all the time

Status Open - New Case

Employee Name [Carmichael Espinosa](#)

Contact Method

Related Action Summary				
		Customize   Find       First 1-2 of 2 Last		
Type	Summary	Status	Date Created	Added By
Work Order	<a href="#">0000000020 - CD ROM doesn't wo...</a>	Open NOW	08/28/2009 2:19PM PDT	Stu Marx
Work Order	New		08/28/2009 2:35PM PDT	Stu Marx

Related Actions

## Image: Installed Assets: History page - Related Transactions

This example illustrates the fields and controls on the Installed Assets: History page - Related Transactions.

**Installed Assets**

Save | Search | Add Install Product | 360-Degree View | >> Personalize

SetID SHARE Employee Carmichael Espinosa  
 Installed Product ID 300043 Asset Department Human Resources  
 Product Toshiba Tecra Series Asset Location Corporation Headquarters

Installed Product Attributes History

Events Related Transactions Interactions Audits

**Cases**

Customize | Find | View All | First 1-2 of 2 Last

Case	Work Order	Summary	Status	Date Created	Created By	Date Closed
<a href="#">220536</a>	<a href="#">0000000021</a>	CD ROM doesn't work all the time	Open - New Case	08/28/2009	Oprid for CRMSKT, CRMQABAK	
<a href="#">220536</a>	<a href="#">0000000020</a>	CD ROM doesn't work all the time	Open - New Case	08/28/2009	Oprid for CRMSKT, CRMQABAK	

**Change Requests**

There are no associated change requests.

Before PeopleSoft CRM receives the Add/Update Transaction Acknowledgement message from PeopleSoft Financials, the system populates these fields in the Related Action Summary grid:

- Type

The system populates this field with the words *Work Order*.

- Summary

The system populates this field with the word *New*, indicating that the work order is in the process of being created.

- Status

The system does not populate this field until the work order is actually created in PeopleSoft Maintenance Management.

- Date Created

Date the agent initiated the creation of the work order (not the date the work order was actually created in PeopleSoft Maintenance Management).

- Added By

The system populates this field with the login name of the agent who created the work order.

---

**Note:** If another help desk case is related to an existing work order, the Added By field displays the name of the agent who created the work order, not the name of the person who linked the existing work order to the case.

---

Once PeopleSoft CRM receives the Add/Update Transaction Acknowledgement message, the system updates the Related Action Summary grid for the work order row. Updating consists of displaying the

work order ID and description in the Summary field and turning the text into a link that agents can use to view the work order in PeopleSoft Maintenance Management. Additionally, the system resets the Status field to the Work Order header status and sets the Date Created field to the date and time that the work order was created in PeopleSoft Maintenance Management.

When a work order cannot be created in PeopleSoft Financials, it sends an error message to the CRM database. To view the message, click the Error Details link on the Case - Related Action Summary page.

---

## Replying to Work Order Information Requests

This section provides an overview of information requests and discusses how to reply to information requests for work orders in PeopleSoft CRM.

### Page Used to Reply to Work Order Information Requests

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Reply To Work Order Information Request	WM_WO_NOTE_REPLY	Click the URL in the request for information email that is sent from PeopleSoft Maintenance Management.	Provide more information to the technician who is working on a fix or servicing your customer's problem.

### Understanding Information Requests

To request information on the work order for a specific task, a technician must create a task note in PeopleSoft Maintenance Management by selecting the Needs Reply check box and then entering text in the Note field requesting additional information.

When the technician clicks the Send To Requester button, PeopleSoft Maintenance Management sends a request for information by email to the agent handling the case and sets an indicator on the Work Order, Tasks Notes, and Notes pages in PeopleSoft Maintenance Management to capture the request for more information. This indicator is also used to capture request-for-information replies from PeopleSoft CRM. The contents of the email notification are determined by PeopleSoft Maintenance Management.

To respond to the request, the agent using the CRM application clicks the URL in the email. The URL has the work order ID embedded in it. When an agent clicks the link, the system displays the Reply To Work Order Information Request page in PeopleSoft Maintenance Management. The agent completes the reply and saves it.

After the agent saves the Reply to Work Order Information Request, PeopleSoft Maintenance Management creates a new work order task note to capture the reply, updates the reply indicator on all pages, and sends an email notification to the technician indicating that a reply has been received.

PeopleSoft HelpDesk ignores the Key Event Change Notification message when it contains a request for more information and a reply to a request for more information, as the work order task notes are not stored on the Case Notes page in PeopleSoft CRM.

For information purposes only, the Key Event Change Notification message sends the note, case ID, and work order ID to PeopleSoft HelpDesk. In the event that the case is reassigned to another agent, the Add Work Order Transaction message sends contact information to PeopleSoft Maintenance Management.

Therefore, PeopleSoft Maintenance Management should always have the most current assigned-to person for a given case. To complete the process, the technician reviews the note and selects the Reviewed check box. PeopleSoft Maintenance Management updates the reply indicator on the Work Order, Tasks Notes, and Notes pages.

## Reply To Work Order Information Request Page

Use the Reply To Work Order Information Request page (WM\_WO\_NOTE\_REPLY) to provide more information to the technician who is working on a fix or servicing your customer's problem.

### Navigation

Click the URL in the request for information email that is sent from PeopleSoft Maintenance Management.

### Image: Reply To Work Order Information Request page

This example illustrates the fields and controls on the Reply To Work Order Information Request page.

**Reply To Work Order Information Request**

Business Unit US001 Work Order ID [12345678](#) oil change

**Original Message**

From: J. Technician

For Business Unit/Case [CRM BU #1/Case #1](#)

Subject: Request #0003 - 08/10/04

Note: Please provide date of last major maintenance

**Reply Message**

Reply To: J. Technician

Subject: Reply To #0003

Note: Last major maintainance performed on 3/1/02

Save

Enter the information that the technician requested in the Note field in the Reply Message section of the page. Click Save when you are finished. The system creates a new work order task note to capture the reply, updates the reply indicator on all pages, sends an email notification to the technician indicating that a reply has been received, and sends a Key Event Change Notification message with the response text to PeopleSoft HelpDesk.



# Working with Services Operational Dashboards

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## Understanding Services Operational Dashboards

Services operational dashboards are collections of pagelets that are built to provide real-time actionable information for call center managers and agents, which help to increase agent efficiency, offer insight on customer needs and provide call center staff the tools needed to better serve the customer base. PeopleSoft CRM delivers two role-specific dashboards for call centers:

- Manager Dashboard
- Agent Dashboard

Each dashboard consists of pagelets that display call center data relevant to users of that role. Within pagelets, managers and agents can interact with data that is presented in charts and grids by drilling into bars and clicking links, which give them additional information about cases and solutions, as well as better insight on customers that require immediate actions.

Delivered pagelets are WSRP (web services for remote portlets) compliant so they can be used in any WSRP-compliant portal (for example, Applications Portal) or any other compliant external portal. They can be rearranged freely on dashboards by dragging and dropping by their titles to the desired areas, or by clicking the Layout link on the PIA homepage to personalize the dashboard's layout. In addition to the Manager and Agent Dashboards, these pagelets can also appear on the PIA homepage through configuration on the Personalize Content page (PORTAL\_HPCOMP).

See *PeopleTools: PeopleSoft Applications User's Guide*, Setting User Preferences, Personalizing Layout.

## Manager Dashboard

The Manager Dashboard displays operational data for cases that are assigned to provider groups and these provider groups are associated with the manager that is selected in pagelet personalization pages of the logged on user. The manager-provider group relationship is established on the Provider Groups page.

The Manager Dashboard includes these pagelets out of the box:

- Cases at Risk of Exceeding SLA (service level agreement)
- Manager Case Backlog
- Case Arrivals versus Closures
- Top Solutions by Product
- Top Solutions by Library

- Top Solutions by Category



[PeopleSoft CRM Manager Dashboard](#)

See Working with the Manager Dashboard for more information on dashboard pagelets.

## Agent Dashboard

The Agent Dashboard displays information of all open cases that are assigned to the logged on agent. It includes these pagelets out of the box:

- My Case Backlog
- My Open Case SLA Status
- Agent - My Cases
- Top Solutions by Product
- Top Solutions by Library
- Top Solutions by Category



[PeopleSoft CRM Agent Dashboard](#)

See Working with the Agent Dashboard for more information on dashboard pagelets.

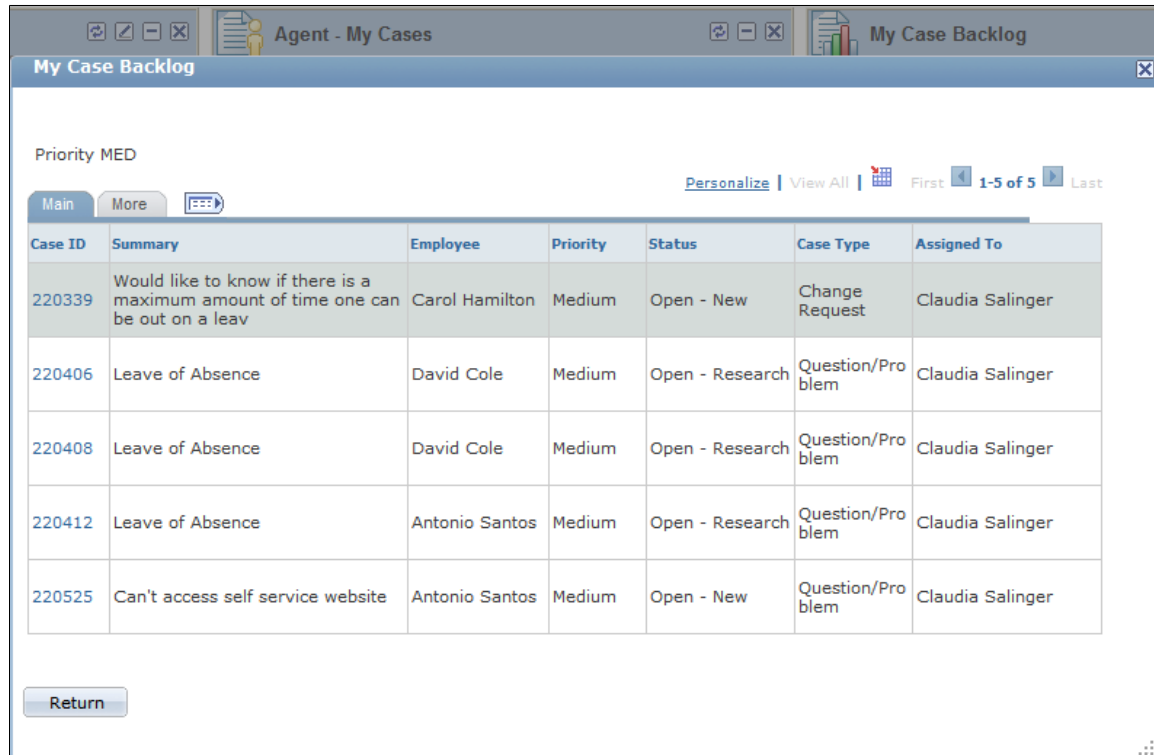


## Understanding Pagelets with Bar Charts

Several delivered pagelets represent case information in the form of stacked bar charts. These charts are interactive. When you put your mouse over a bar, hover text appears, showing the number of cases with the status or priority that the bar represents. When you click a bar, a modal secondary page is displayed:

**Image: Modal secondary page appears with a list of cases after clicking a bar on a stacked bar chart**

This example illustrates the fields and controls on the Modal secondary page appears with a list of cases after clicking a bar on a stacked bar chart.



Priority MED

Personalize | View All | First 1-5 of 5 Last

Case ID	Summary	Employee	Priority	Status	Case Type	Assigned To
220339	Would like to know if there is a maximum amount of time one can be out on a leave	Carol Hamilton	Medium	Open - New	Change Request	Claudia Salinger
220406	Leave of Absence	David Cole	Medium	Open - Research	Question/Problem	Claudia Salinger
220408	Leave of Absence	David Cole	Medium	Open - Research	Question/Problem	Claudia Salinger
220412	Leave of Absence	Antonio Santos	Medium	Open - Research	Question/Problem	Claudia Salinger
220525	Can't access self service website	Antonio Santos	Medium	Open - New	Question/Problem	Claudia Salinger

Return

The page lists the summary information of the cases that the bar represents. Clicking a case ID link transfers you to the Case component on a new browser window where you can update the case.

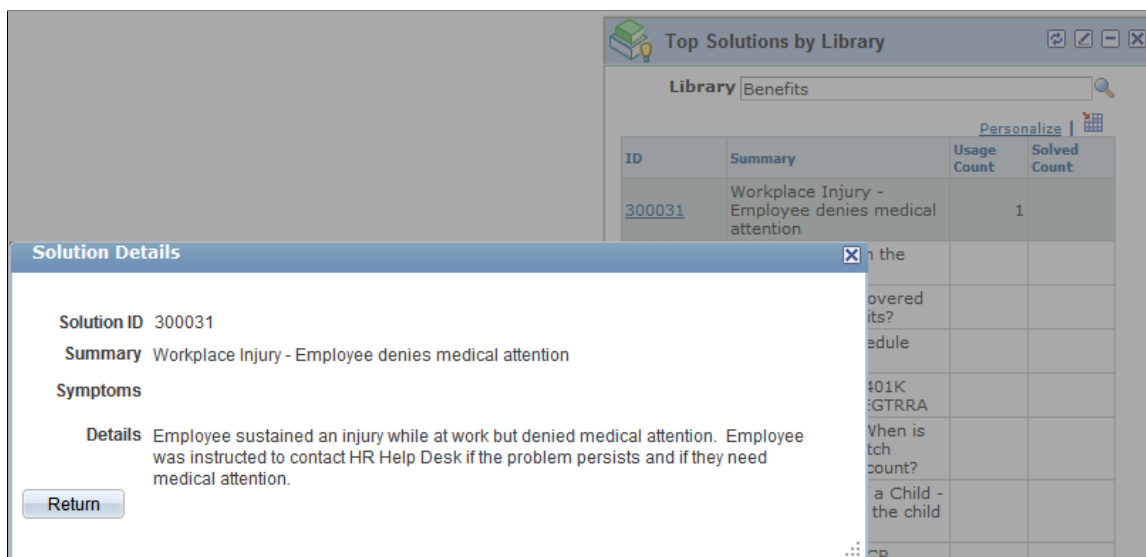
## Understanding Pagelets with Grids

Solutions-specific pagelets are built in the form of grids. Each grid displays the top ten solutions with the highest solved counts and usage counts. It shows basic information such as solution summary, usage counts and the number of times they are used to solve cases. For each solution-specific pagelet, you can change the criterion (product, solution library, and category) by which the solution information is filtered.

You can also click a solution ID link to transfer to a modal secondary page and view the solution in more detail:

**Image: Modal secondary page appears with solution detail after clicking a solution ID link**

This example illustrates the fields and controls on the Modal secondary page appears with solution detail after clicking a solution ID link.



**Important!** Make sure to run the Update Solution Usage Counts process that updates solution usage and solved count, so that solutions can be ranked and displayed properly on pagelets.

## Setting Up Services Operational Dashboards

Perform these steps to set up services operational dashboards:

- Specify default values for use in dashboard pagelets on the Call Center page of the User Preferences component for dashboard users.

See "Call Center Page (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

- Specify a manager for each provider group on the Provider Groups page for bar charts on Manager Dashboard to show information properly based on the manager selected in personalization settings.

See "Defining Provider Groups (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

- Make sure that the Percent of SLA for Red and Percent of SLA for Yellow options are enabled on the Business Unit - Options page for SLA pagelets to display information properly.

See Business Unit - Options Page.

- Run the Update Solution Usage Counts AE process to update solution usage counts as well as solution usage counts by categories, types and details.

See "Update Solution Usage Counts Page (*PeopleSoft CRM 9.2: Services Foundation*)".

## Working with Services Operational Dashboards

This section discusses how to:

- Work with the Manager Dashboard.
- Work with the Agent Dashboard.

### Pages Used to Work with Services Operational Dashboards

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Services Manager Dashboard HelpDesk Manager Dashboard HR HelpDesk Manager Dashboard Service Center Mgr Dashboard	(not applicable)	<ul style="list-style-type: none"> <li>• Services Manager Dashboard</li> <li>• HelpDesk Manager Dashboard</li> <li>• HR HelpDesk Manager Dashboard</li> <li>• Service Center Mgr Dashboard</li> </ul>	Access the Manager Dashboard to view information and take actions regarding cases that are assigned to provider groups of the manager selected in the logged on user's personalization settings.
Services Agent Dashboard HelpDesk Agent Dashboard HR HelpDesk Agent Dashboard Service Center Agent Dashboard	(not applicable)	<ul style="list-style-type: none"> <li>• Services Agent Dashboard</li> <li>• HelpDesk Agent Dashboard</li> <li>• HR HelpDesk Agent Dashboard</li> <li>• Service Center Agent Dashboard</li> </ul>	Access the Agent Dashboard to view information and take actions regarding cases that are owned by agents.

### Common Elements Used In This Section



**(Refresh)**

Click to refresh data display on the corresponding pagelet. Or, press the F5 key or the refresh button of the web browser to refresh all pagelets in the entire dashboard.

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**Note:** Refresh the dashboards for the latest operational data to be displayed.

---



**(Personalize)**

Click to personalize settings of the corresponding pagelet. The same options are also available on the User Preferences - Call Center page. When you make changes here, the changes are reflected in the pagelet display as well as the User Preferences component.

The system delivers these pages to personalize individual dashboard pagelets:

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**Important!** Oracle highly recommends that you specify your personalization options and values for all pagelets so they can display information that pertains to your job area.

---

- Personalize Case Arrivals versus Closures (RC\_ARRIVAL\_PRS)
- Personalize Cases at Risk of Exceeding SLA (RC\_SLARISK\_PRS)
- Personalize Manager Case Backlog (RC\_BACKLOG\_MGR\_PRS)
- Personalize Agent Case Backlog (RC\_BACKLOG\_AGT\_PRS)
- Personalize My Open Case SLA Status (RC\_MYSLA\_PRS)
- Personalize Top Solutions By Category (RC\_SOLCAT\_PRS)

The system prepopulates the fields with the corresponding values that are defined on the User Preferences - Call Center page for the logged on user.



- Personalize Top Solutions By Product (RC\_SOLBYPROD\_PRS)

The system prepopulates the fields with the corresponding values that are defined on the User Preferences - Call Center page for the logged on user.

- Personalize Top Solutions By Library (RC\_SOLLIB\_PRS)

The system prepopulates the fields with the corresponding values that are defined on the User Preferences - Call Center page for the logged on user.

See "Call Center Page (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

 (Minimize) and  (Expand)

Click to toggle between collapsing and expanding the corresponding pagelet.

 (Remove)

Click to remove the corresponding pagelet from the dashboard.

Use the Content link on the PIA home page to add back deleted pagelets.

### View By

Select how the case information should be filtered and displayed on pagelets with bar charts, by status, priority, or predefined time frame.

**ID**

Click the solution ID link to view the solution detail in a modal secondary page.

## Working with the Manager Dashboard

Access the Services Manager Dashboard page (Services Manager Dashboard).

### Cases at Risk of Exceeding SLA Pagelet (RC\_SLAEXCEED\_PLT)

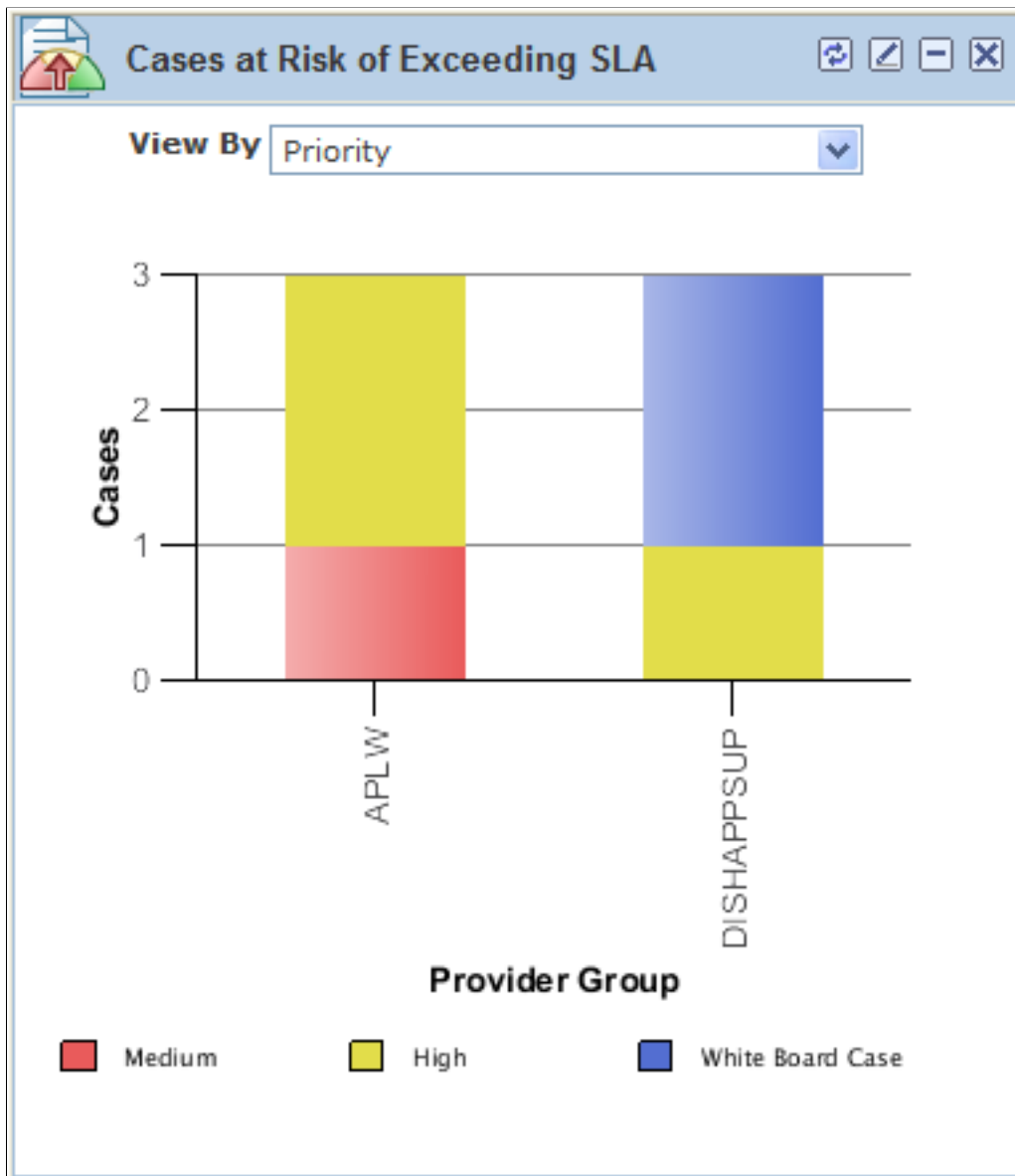
This pagelet displays the number of cases, which are assigned to provider groups of the manager selected in the logged on user's personalization settings, that are at risk of missing or already missing their SLAs. In the CRM system, a case is considered at risk of exceeding its SLA when its yellow date and time is about to pass or have passed, or *exceeding its SLA* when its red date and time is about to pass or have passed. A yellow or a red date and time refers to the restore time of a case that is running the risk of failing to meet its SLA. The restore time of a case is calculated based on the entitlements of the agreement that the case associates with. The calculation takes into account the service level selected on the agreement and the holiday schedule. When you save a case with an agreement selected, the restore time is computed and populated on the More tab of the Case page. As an administrator, you can configure the system to alert agents and managers of cases that are at risk of not meeting SLAs. Enable the Percent of SLA for Red and Percent of SLA for Yellow options on the Business Unit - Options page and enter the percentages of case restore time that has elapsed for the system to turn an unresolved case to red (exceeds SLA) and yellow (at risk of exceeding SLA) statuses. For example, the restore time of a newly saved case is set to 10 hours from now. If the SLA for red and SLA for yellow are set at 90 and 50 percents of the case restore time, the system turns the unresolved case to the yellow state in five hours and the red state in nine hours. As delivered, the restore dates and times for the red state and yellow state are enabled for display on Support cases.

Managers can use information provided in this pagelet to identify provider groups and agents who are struggling to meet customer SLA commitments. They see how these cases are allocated among provider

groups by status and priority. With this data, they can take actions, such as reassigning cases, to balance the workload of each of their provider groups.

**Image: Cases at Risk of Exceeding SLA pagelet in Manager Dashboard**

This example illustrates the fields and controls on the Cases at Risk of Exceeding SLA pagelet in Manager Dashboard.



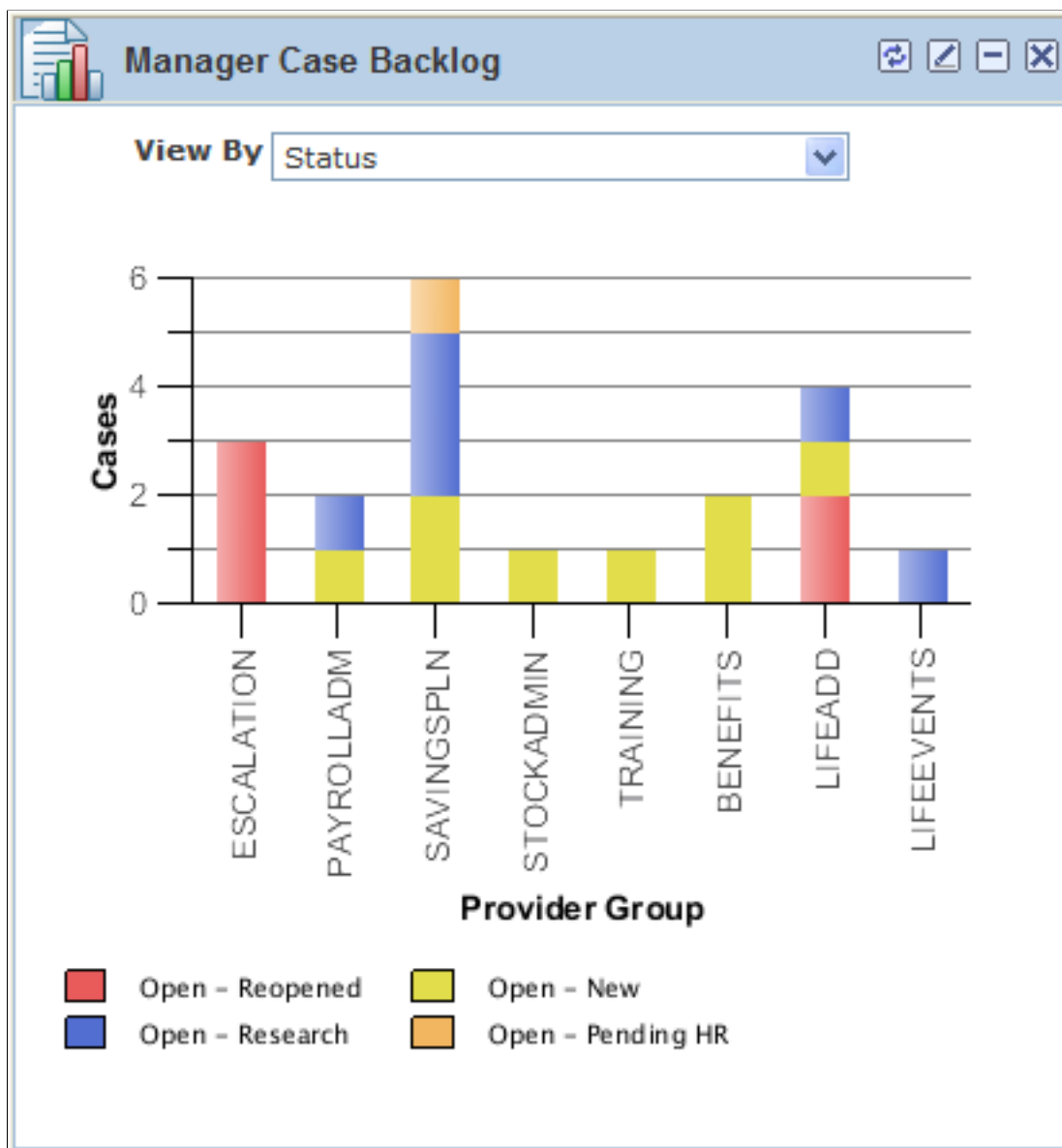
**Note:** Case priority is not a required field in cases; for cases that do not have this value specified, they are represented in bar chart pagelets using the *No Priority* legend.

## Manager Case Backlog Pagelet (RC\_BACKLOG\_MGR\_PLT)

This pagelet displays the number of open cases that are assigned to provider groups of the logged on manager, by priority or status.

### Image: Manager Case Backlog pagelet in Manager Dashboard

This example illustrates the fields and controls on the Manager Case Backlog pagelet in Manager Dashboard.



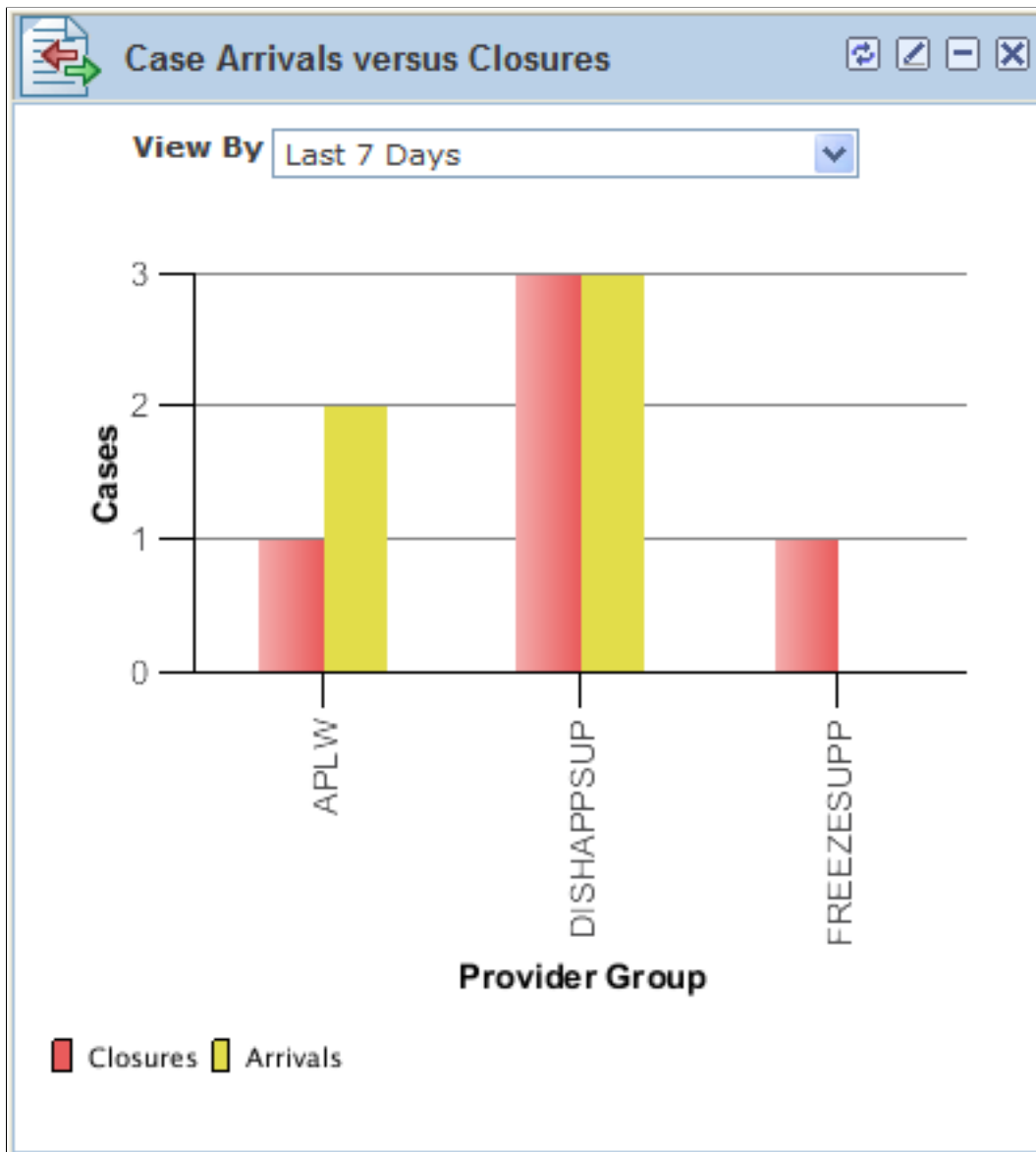
## Case Arrivals Versus Closures Pagelet (RC\_ARRIVAL\_PLT)

This pagelet displays the numbers of new cases and closed cases that are assigned to provider groups of the manager selected in the logged on user's personalization settings. Managers can choose the time range for which the information is presented: for the past day, the past seven days, or the past 30 days. The pagelet provides a side-by-side comparison of the numbers, giving managers an idea of how each provider group is doing in terms of workload and availability.

The data on case arrivals and case closures, as shown on this pagelet, is based on the case created date and case closed date (viewable in the Audit History section of cases).

**Image: Case Arrivals versus Closures pagelet in Manager Dashboard**

This example illustrates the fields and controls on the Case Arrivals versus Closures pagelet in Manager Dashboard.



**Top Solutions by Product Pagelet (RC\_SOLPROD\_PLT)**

This pagelet lists the top ten most frequently used solutions to resolve cases created for the specified product. Solutions with the highest solved counts appear first, followed by those with the highest usage counts, and the most recently used.

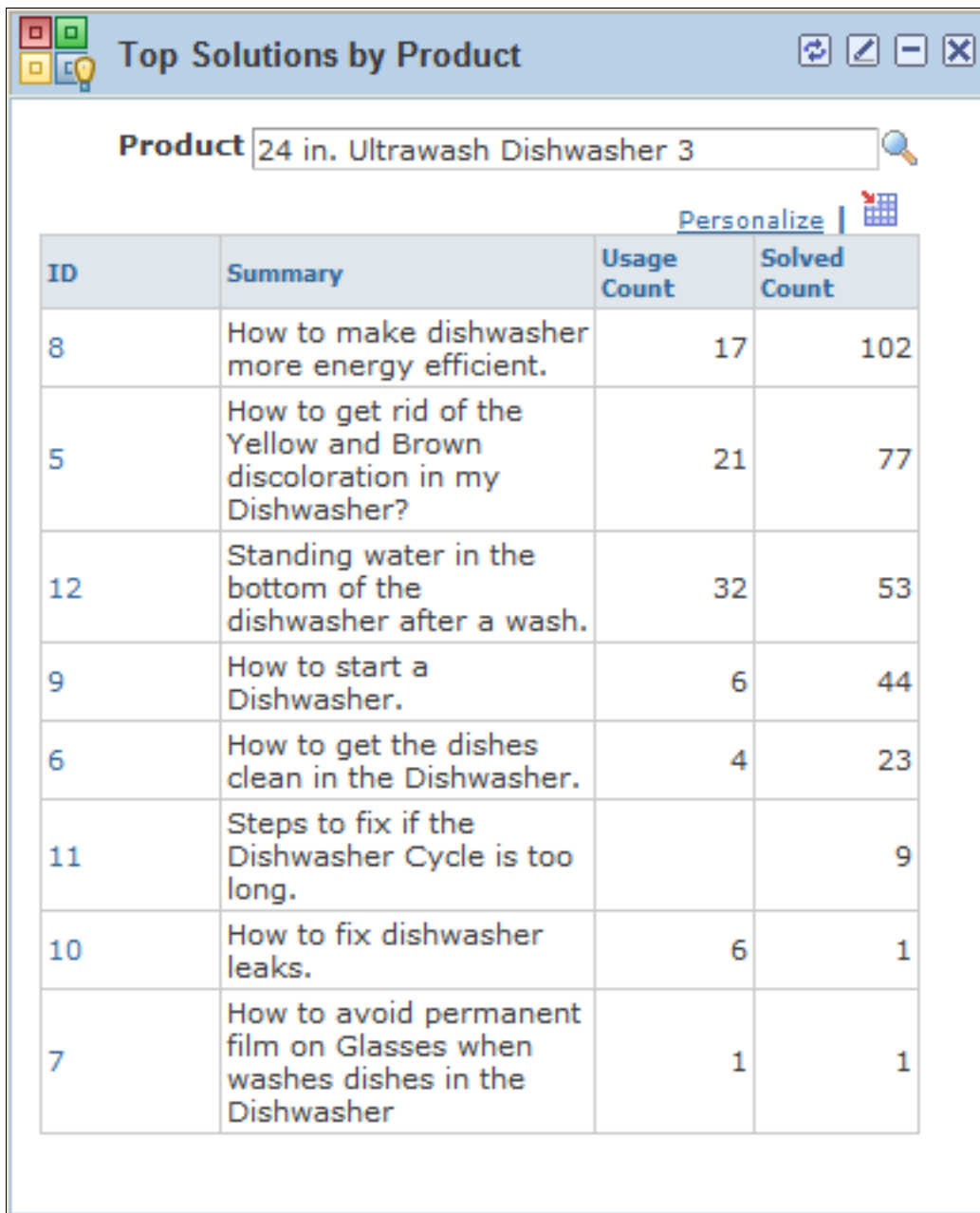
Only active, non-adhoc type solutions are eligible for display on this pagelet.



Solutions are associated with products on the Related Actions page on the Solution component.

**Image: Top Solutions by Product pagelet in Manager and Agent Dashboards**

This example illustrates the fields and controls on the Top Solutions by Product pagelet in Manager and Agent Dashboards.



ID	Summary	Usage Count	Solved Count
8	How to make dishwasher more energy efficient.	17	102
5	How to get rid of the Yellow and Brown discoloration in my Dishwasher?	21	77
12	Standing water in the bottom of the dishwasher after a wash.	32	53
9	How to start a Dishwasher.	6	44
6	How to get the dishes clean in the Dishwasher.	4	23
11	Steps to fix if the Dishwasher Cycle is too long.		9
10	How to fix dishwasher leaks.	6	1
7	How to avoid permanent film on Glasses when washes dishes in the Dishwasher	1	1

**Note:** As delivered, the Top Solutions by Product pagelet is not displayed on HR HelpDesk dashboard pages as product groups and products are not enabled in display templates for use in HR HelpDesk cases. However, if you have these fields enabled for HRHD cases, you can make this pagelet available on both dashboards to view top solutions that are filtered by products.

**Product**

Select the name of the product by which the solution list is filtered. The system populates the default value of this field

that is specified on the Call Center page of the User Preferences component.

See "Call Center Page (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

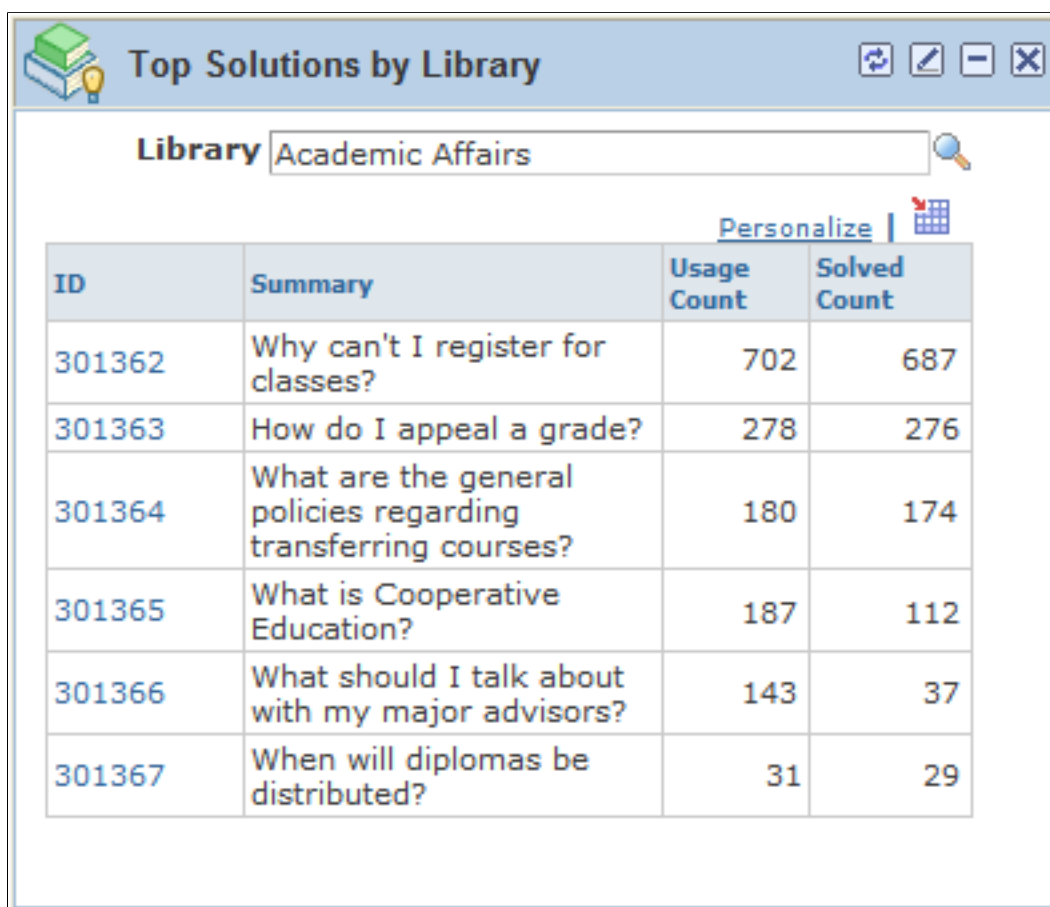
### Top Solutions by Library Pagelet (RC\_SOLLIB\_PLT)

This pagelet lists, for the specified library, the top ten most frequently used solutions to resolve cases. Solutions with the highest solved counts appear first, followed by those with the highest usage counts, and the most recently used.

Only active, non-adhoc type solutions are eligible for display on this pagelet.

#### Image: Top Solutions by Library pagelet in Manager and Agent Dashboards

This example illustrates the fields and controls on the Top Solutions by Library pagelet in Manager and Agent Dashboards.



ID	Summary	Usage Count	Solved Count
301362	Why can't I register for classes?	702	687
301363	How do I appeal a grade?	278	276
301364	What are the general policies regarding transferring courses?	180	174
301365	What is Cooperative Education?	187	112
301366	What should I talk about with my major advisors?	143	37
301367	When will diplomas be distributed?	31	29

### Top Solutions by Category Pagelet (RC\_SOLCAT\_PLT)

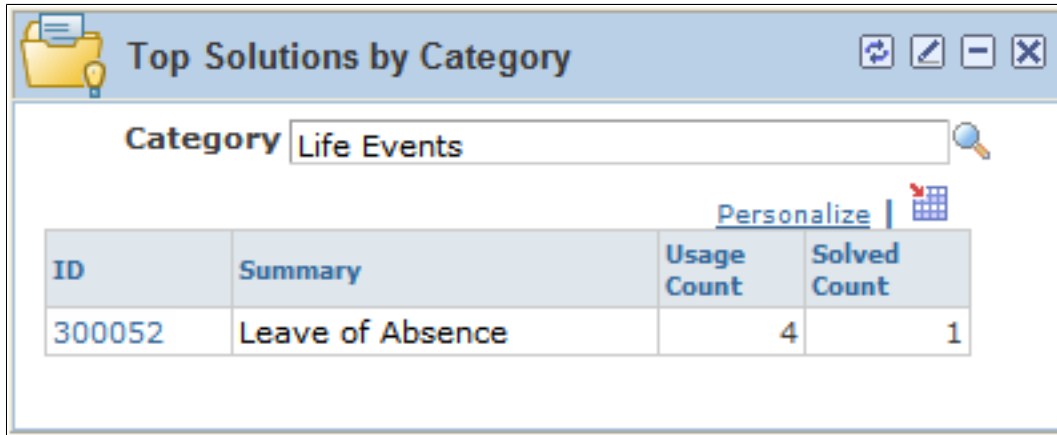
This pagelet lists, for the specified case category, the top ten most frequently used solutions to resolve cases. Solutions with the highest solved counts appear first, followed by those with the highest usage counts, and the most recently used.

Only active, non-adhoc type solutions are eligible for display on this pagelet.

Solutions are associated with case categories on the Related Actions page on the Solution component.

**Image: Top Solutions by Category pagelet in Manager and Agent Dashboards**

This example illustrates the fields and controls on the Top Solutions by Category pagelet in Manager and Agent Dashboards.



ID	Summary	Usage Count	Solved Count
300052	Leave of Absence	4	1

**Related Links**

[Business Unit - Options Page](#)

"Solution - Related Actions Page (*PeopleSoft CRM 9.2: Services Foundation*)"

## Working with the Agent Dashboard

Access the Services Agent Dashboard page (Services Agent Dashboard).

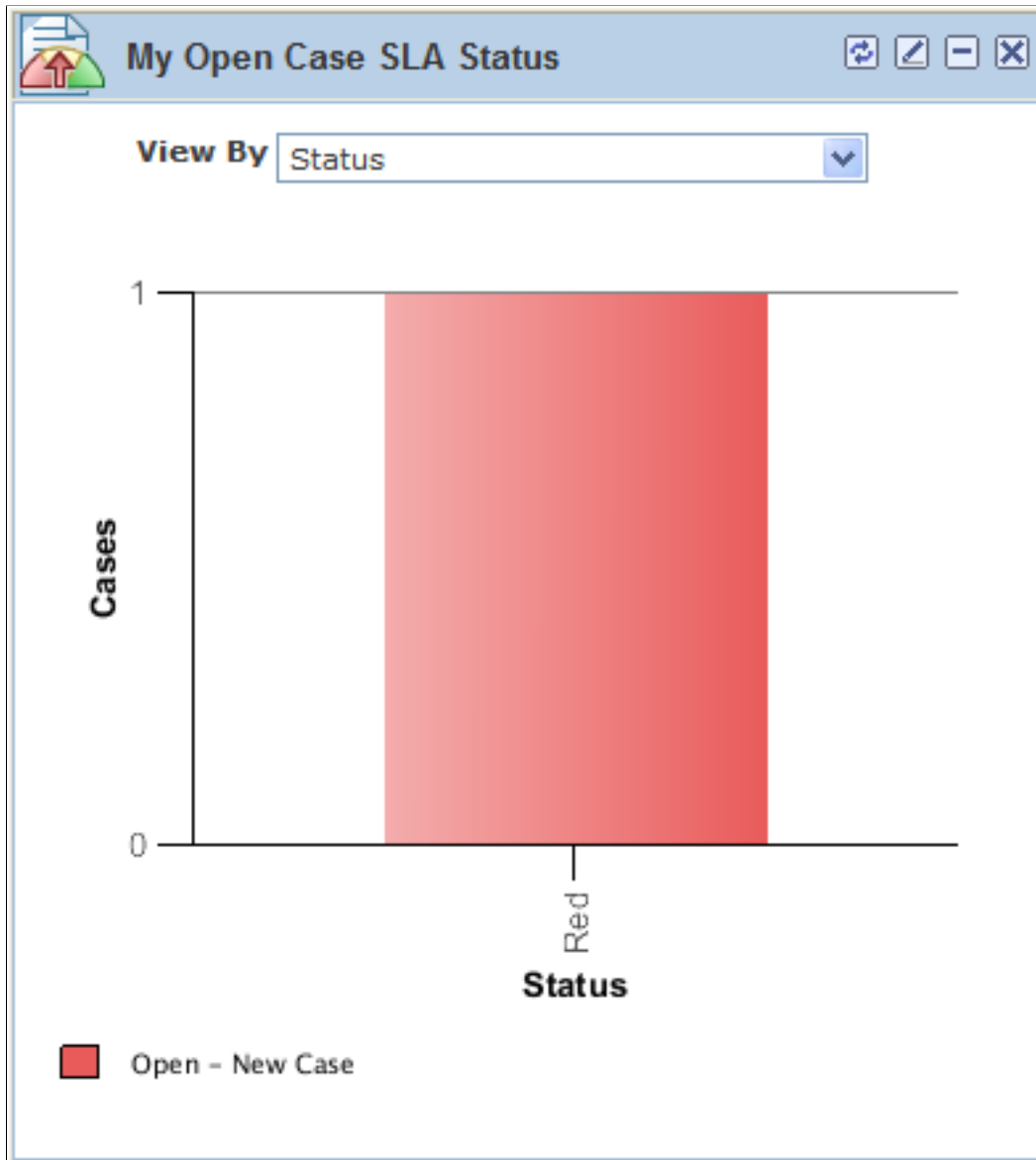
### My Open Case SLA Status Pagelet (RC\_MYSLA\_PLT)

This pagelet displays, for the logged on agent, all of his or her open cases that are at risk of missing or already missing their SLAs. Agents can use information provided in this pagelet to identify cases that need immediate attention. Data on this pagelet can be viewed by case status or priority.

Refer to the Cases at Risk of Exceeding SLA Pagelet section for more information on how the system determines cases that are at risk of exceeding or already exceeding SLAs.

**Image: My Open Case SLA Status pagelet in Agent Dashboard**

This example illustrates the fields and controls on the My Open Case SLA Status pagelet in Agent Dashboard.

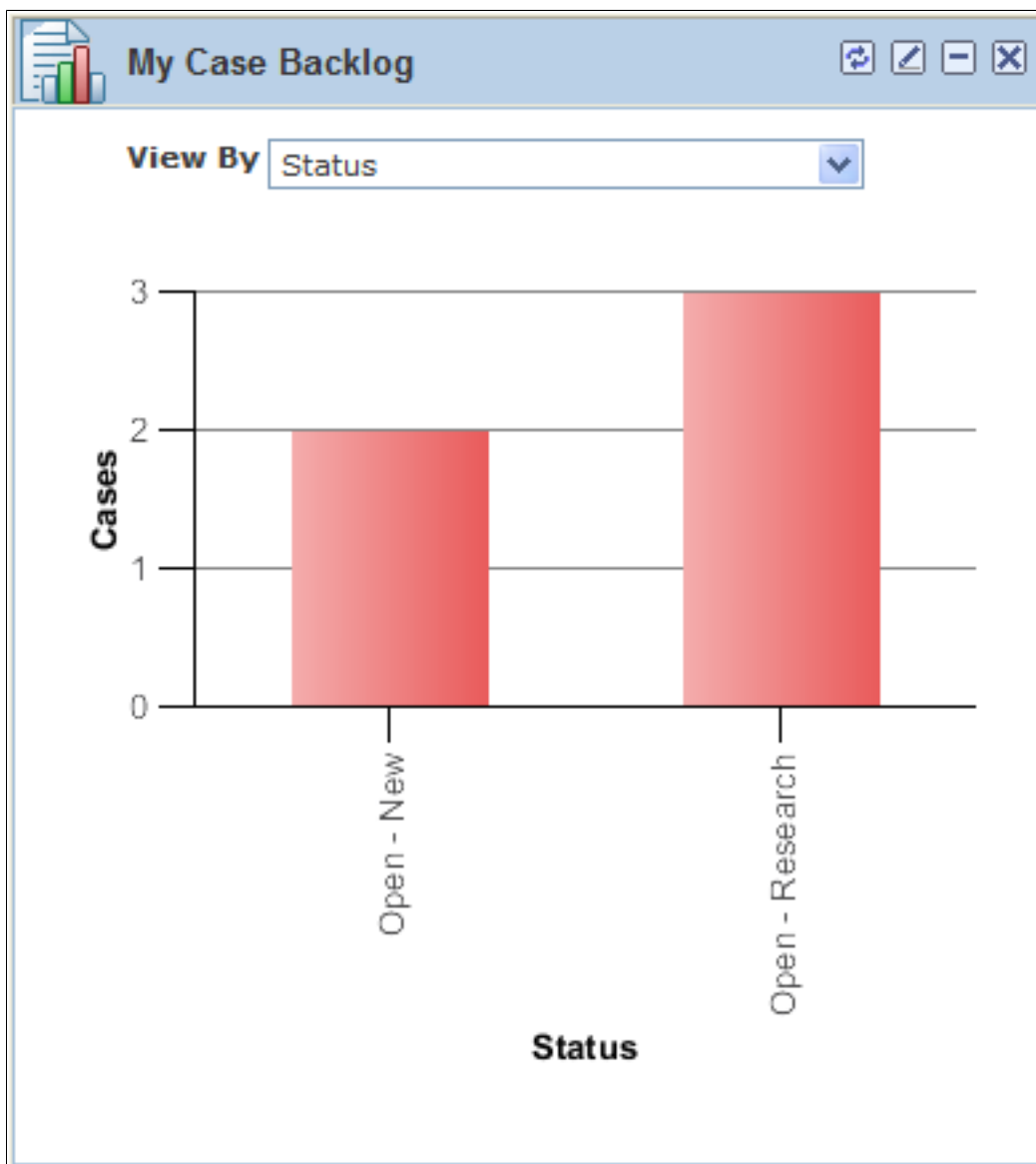


## My Case Backlog Pagelet (RC\_BACKLOG\_AGT\_PLT)

This pagelet displays the number of open cases that are assigned to the logged on agent. Data on this pagelet can be viewed by case status or priority.

### Image: My Case Backlog pagelet in Agent Dashboard

This example illustrates the fields and controls on the My Case Backlog pagelet in Agent Dashboard.



---

**Note:** Case priority is not a required field in cases; for cases that do not have this value specified, they are represented in bar chart pagelets using the *No Priority* legend.

---

## Agent - My Cases Pagelet (RC\_AGT\_CASES\_PGT\_W)

Similar to the My Case Backlog pagelet, this pagelet displays open cases that are currently assigned to the logged on agent. In this pagelet, case information is presented in a grid, allowing agents to sort cases by column headings and prioritize their cases based on, for example, customer, case summary, case creation

date, priority, status, or entitled restore date and time. Click a case ID link to open and edit the case in a browser window or tab.

Delivered views are available in this pagelet for agents to filter cases that they are interested in:

- All of my cases that were modified in the past 30 days.
- All of my cases that were modified in the past 7 days.
- All of my open cases.
- All unassigned cases in my provider group.

Through this view, agents can review and cherry-pick unassigned cases to work on based on their skills and availability.

In addition, agents can add new cases (created using case default values that are specified for agent's business unit) and search existing cases (associated with agent's business unit) from this pagelet.

### Image: Agent - My Cases pagelet in Agent Dashboard

This example illustrates the fields and controls on the Agent - My Cases pagelet in Agent Dashboard.

Case ID	Customer	Status	Priority
<a href="#">220525</a>	Antonio Santos	Open - New	Medium
<a href="#">220412</a>	Antonio Santos	Open - Research	Medium
<a href="#">220408</a>	David Cole	Open - Research	Medium
<a href="#">220406</a>	David Cole	Open - Research	Medium
<a href="#">220339</a>	Carol Hamilton	Open - New	Medium

[Add Case](#)   [Search Cases](#)   Case ID

### **Top Solutions by Product Pagelet**

This pagelet lists the top ten solutions that are most frequently used to resolve cases created for the specified product.

See Working with the Manager Dashboard

### **Top Solutions by Library Pagelet**

This pagelet lists, for the specified library, the top ten solutions that are most frequently used to resolve cases.

See Working with the Manager Dashboard

### **Top Solutions by Category Pagelet**

This pagelet lists, for the specified case category, the top ten solutions that are most frequently used to resolve cases.

See Working with the Manager Dashboard





# Using Change Management

---

## Understanding Change Request Access

This section discusses the five ways to access change requests:

- Through the HelpDesk menu.

Navigate to HelpDesk, Add Change Request or HelpDesk, Search Change Requests.

---

**Note:** If you want to create a new change request, the system displays a blank Change Request page. If you want to search for existing change requests, the system displays the configured search page for Change Management.

---

- From the HelpDesk Case page.

From the HelpDesk Case page, the Actions section enables the user to directly create a new change request. Creating the request for change from the case creates a direct link between the change request and the case. You can view the change request from the case and the case from the change request.

- From the Quality Management - Defect page.

Using the Related Actions functionality, you can create a new change request directly from the defect. Also, you can identify and link an existing change request to the defect. Linking causes the change request to be viewed from the defect, and the defect to be viewed from the change request.

- From the Worker 360-Degree View page.

This page provides the ability to both add a new change request from the employee view, and to view any requests already added by that employee.

- From Employee Self Service.

You can add a change request by navigating to Employee Self Service, HelpDesk, Add Change Request.

---

## Understanding Change Request Management

This section discusses:

- Main Change Request page.
- Notes page.
- Tasks page.

- History page.
- Related Changes page.
- Related Actions page.
- Interested Parties page.

## Main Change Request Page

You can access the main Change Request page by using any of the five available methods. After the page appears, you can see the six distinct sections on the Change Request page:

- Requestor Information section.

The user must enter a change request requester. The agent can select a person from any available employee record. The system provides the default values for the requester's department, location, manager's name, and manager's telephone fields from the employee record that was selected.

- Change Request section.

In this section, you record information about the nature of the change request. The Summary, Business Unit, Request Type, Status, and Priority fields are required to save the change request. The other fields are informational only. You configure values for these fields. You set up these values by navigating to Set Up CRM, Product Related, Change Management.

See [Understanding Change Request Management](#).

- Product Information section.

This section enables you to link a particular product to a change request.

Users can link affected product groups or installed products to the change request using the Lookup button. They can refine the affected product further by linking the specific asset tag of the item affected. The View Affected Parties link appears when the selected installed product has specific employees linked to it. Clicking this button results in the appearance of all of the linked employees.

- Change Control section.

This section is used to record more specific information about the change request. The Impact, Category, Release #, Resolution, and Requested By Date fields are informational only.

The start dates and start and end times are not only informational; the system uses these fields to calculate duration. The 24/7 check box enables work to be scheduled beyond a normal Monday to Friday, 9 to 5 work week.

The system uses the values entered in the Schedule subsection as a guide for the phase and for the task start and end dates. All phase and task dates, whether built manually in the Phase Summary section on the main Change Request page or populated automatically from the Phase Model setup option, are not allowed to start before the start date indicated in the Schedule subsection in the Change Control section. The system provides the value in the End Date field by default. It is the last date on the last task when the phase model or task model was either built or automatically loaded.

- Phase Summary section.

Use this section to manage the phases and tasks that are associated to a change request. Only phases are displayed in this grid. You can view associated tasks and phases on the Tasks page. Each phase in the Phase Summary section consists of a task or set of tasks that need to be completed in order for a change to be successful. Any required approvals should be presented in the form of an approval task.

See [Tasks Page](#).

You can build phases manually in this grid. Alternatively, you can have the system automatically populate phases and tasks by selecting a template and clicking the Load button.

See [Setting Up Phase Templates](#).

You can load any template by choosing the appropriate template name and clicking the Load button.

If users click the Load button without first selecting a phase template, all phase templates whose type, subtype, or priority fields match the type, subtype, and priority fields of the change request appear. Users then select the desired phase template, thus populating the phases in the Phase Summary grid and tasks on the Task page. You can manually build phases by clicking the Add Phase button.

- Audit History section.

This section tracks the dates and times that the change request was created and modified.

---

**Note:** The Change Control, Phase Summary, and Audit History sections are collapsed by default when you access the Change Request page.

---

See [Accessing Change Requests](#).

## Notes Page

Notes pages follow the standard Notes and Attachments format that is used throughout the PeopleSoft CRM application suite. During the course of a change cycle, specific types of documentation may be required, such as backout plans, design documents, or a cost benefit analysis.

To identify these common documents within a specific note, PeopleSoft Change Management provides a Note Type field. Before adding an attachment to the note, you can identify the note type from the drop-down list box. The user configures the values in this field.

### Related Links

"Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Tasks Page

The Tasks page displays all tasks, process flow steps, and decision points that are associated with a Change Request. PeopleSoft Change Management carries the task ID link to point to the Task Management application for the actual definition of the task.

Task Management tracks each task associated with a change request. Change Management uses Task Management functions for task groups to further define and control the process flow of a change request.

Tasks can be added, deleted, and edited from this page. They can be added automatically using the phase model or added manually.

---

**Note:** When an owner is added or changed on a change request, and at least one task is in the status of *In Progress*, the system displays a message asking if the change request owner should be applied to any uncompleted tasks. If the user clicks *No*, the system does not apply the owner on the change request to any tasks when the change request is saved. If the user clicks *Yes*, the system applies the owner on the change request to all uncompleted tasks that are not canceled when the change request is saved. If there are no tasks with the status of *In Progress*, then the system applies the owner change to all tasks on the change request, and the user does not receive a message. The system automatically makes the change.

---

## Related Links

"Managing Tasks (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## History Page

AAF events control the process flow of a change request. Whenever an event is processed on a change request, it is audited and then appears on the History Events page.

Whenever a change is processed on a change request, it is audited and then appears on the History Audit page. The records to be audited are configurable when you set up your PeopleSoft CRM applications. History interactions appear when email is used to notify an assigned worker of a task action or status change.

## Related Changes Page

The Related Changes page provides the ability to link similar change requests in either a parent/child or an equal relationship.

A status change is referred to as *cascading* when a status change on one change request causes the same status change on one or more change requests automatically. Cascading changes occur when a user manually changes the status or when an AAF rule executes unattended.

Several conditions must exist for cascading status changes to occur. First, the change request whose status is being changed must be related to another change request. Two characteristics define each relationship:

- Type
- Hierarchical indication

When the type is *Global* and the hierarchy indicator is a parent of the change request whose status is changing, then a cascading status occurs. If the status change is to a final type status (such as *Closed*, *Completed*, or *Rejected*) then the system displays a related change request with the two characteristics. These changes apply to online manual status changes.

For AAF rule execution status changes, the status is cascaded automatically when the Changed To status is marked as a cascading type status (see Status setup for this indicator).

---

**Note:** PeopleSoft Change Management does not deliver a definition or AAF rule for rule execution status changes. You can, however create your own rules using the PeopleSoft AAF functionality.

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See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Related Actions Page

PeopleSoft Change Management also provides the ability to link cases and defects to a change. If a change request was initiated by defect identification or from a help desk case, you can link those defects and cases directly to the change request.

Linking a defect or case to a change request enables the user to drill down into these other objects directly from PeopleSoft Change Management. It also causes the change to be linked to the defect or case, and provides the ability to drill down into the Change Request from either PeopleSoft HelpDesk or PeopleSoft Quality Management.

Conversely, you can create and link change requests to defects from PeopleSoft Quality Management and to cases from PeopleSoft HelpDesk. Linking from either of these two applications also creates the linkage in PeopleSoft Change Management.

Linking cases and defects also causes status updates to be forwarded to the help desk agent or the quality analyst. You can determine and configure the type and frequency of the updates using AAF policies.

You will not be able to create either a case or a defect from PeopleSoft Change Management. Similarly, no cascading status functionality exists among cases, defects, and change requests.

## Interested Parties Page

Interested parties, such as individuals who are not part of the change process by way of an assigned task or role, can receive notifications and updates about the change status through their inclusion on the Interested Parties page.

Users can designate interested parties to receive updates for only specific phases or for all phases.

Interested parties are limited to employees. You can determine and configure the type and frequency of the updates using AAF policies.

---

## Accessing Change Requests

This section discusses how to add new change requests and access existing change requests.

### Page Used to Access Change Requests

<i><b>Page Name</b></i>	<i><b>Definition Name</b></i>	<i><b>Navigation</b></i>	<i><b>Usage</b></i>
Change Requests search	RG_CHANGE_SRCH	<ul style="list-style-type: none"> <li>HelpDesk, Search Change Requests</li> <li>Employee Self-Service, HelpDesk, Manage A Change Request</li> <li>Worker 360 - Degree View, Change Requests, Search Requests</li> </ul>	Access existing search requests.

## Change Requests Search Page

Use the Change Requests search page (RG\_CHANGE\_SRCH) to access existing search requests.

### Navigation

- HelpDesk, Search Change Requests
- Employee Self-Service, HelpDesk, Manage A Change Request
- Worker 360 - Degree View, Change Requests, Search Requests

### Image: Change Requests search page (1 of 2)

This example illustrates the fields and controls on the Change Requests search page (1 of 2).

Change Request	Unit	Summary	Requester	Owner	Created
<a href="#">400001</a>	US200	Request for software upgrade	Alan Bailey	Rosa Hall	02/08/2006
<a href="#">400002</a>	US200	Change Request for Software Requirement.	Richard Blaine	Terry Murphy	06/27/2007
<a href="#">400003</a>	US200	Change Request for Infrastructure Management	Douglas Lewis	Spencer Underwood	06/27/2007
<a href="#">400004</a>	US200	Change Request For a Training Course	Spencer Underwood	Alan Bailey	06/27/2007

[Add Change Request](#)

### Image: Change Requests search page (2 of 2)

This example illustrates the fields and controls on the Change Requests search page (2 of 2).

Use Saved Search

[Search](#) [Clear](#) [Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

\*Business Unit =  CRMCO APPLIANCES

Change Request ID begins with

Change Summary begins with

Requester Last Name begins with

Requester First Name begins with

Owner Last Name begins with

Owner First Name begins with

Status =

Request Type =

Sub Type =

Priority =

Category =

Product Group =

Product ID =

[Search](#) [Clear](#) [Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

If the field that you are looking for to search by does not appear on the basic search page, use the advanced search page or click the Personalize Search link and select any unchecked search fields that you wish to use.

The system displays the Personalize Search Settings page if the system administrator has made this page available to you. You can use this page to select additional fields to appear on the search page.

If you still do not see the field that you are looking for, contact your system administrator. Remember that you can enter part of the whole value in most fields, depending on what operators are set for a given search field. Most of these values are also user defined. They are based on the needs of your organization.

## Related Links

"Change Management Page (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding the Configurable Search (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Personalizing the Search Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Performing Searches (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

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## Managing Basic Change Request Information

This section discusses how to:

- Manage basic change request information.
- Add change requests from employee self-service.
- Manage change requests from employee self-service.

## Pages Used to Manage Basic Change Request Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Change Request	RG_CHANGE_REQUEST	<ul style="list-style-type: none"> <li>• HelpDesk, Add Change Request</li> <li>• HelpDesk, Add Case</li> </ul> <p>Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section.</p>	Add new change requests.
Add Change Request	RG_CHANGE_REQ_SS	Employee Self-Service, HelpDesk, Add Change Request	Add new change requests in HelpDesk Self-Service.
Manage Change Requests	RG_CHANGE_SS_SRCH	Employee Self-Service, HelpDesk, Manage A Change Request	Search for and access change requests in HelpDesk Self-Service.

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Navigation</i></b>	<b><i>Usage</i></b>
Collect Attributes for Change Request	RG_ATTR_PROD_SEC	HelpDesk, Add Change Request  Click the Collect Attributes icon on the Manage Product grid of the main Change Request page.	Add or edit attributes to be associated for each installed product on a change request.

## Change Request Page

Use the Change Request page (RG\_CHANGE\_REQUEST) to add new change requests.



## Navigation

- HelpDesk, Add Change Request
- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section.

## Image: Change Request page (1 of 2)

This example illustrates the fields and controls on the Change Request page (1 of 2).

**Change Request** History Select One...

Save | 360 360-Degree View | Notification | Search | >> Personalize

**Change ID** NEW **Requester** Mable Saxon  
**Priority** High **Type** Hardware

Change Request | Notes (0) | Tasks (0) | History | Related Changes (0) | Related Actions (0) | Go To Select One...

**Requester Information**

**\*Requester** Mable Saxon [Search Again](#) **Phone** 925/694-7982  
**Department** Western Sales Region **Location** California Location  
**Manager** No Manager defined **Manager Phone**

**Change Request**

**\*Summary** Upgrade Memory

**Description** Please add 2 gig memory

**\*Business Unit** IT Help Desk **\*Status** In Review  
**\*Request Type** Hardware **Sub Type** Desktop  
**Reason** Problem/Incident **\*Priority** Medium

**Outage**

**Duration**  **Units** Select One...

**Image: Change Request page (2 of 2)**

This example illustrates the fields and controls on the Change Request page (2 of 2).

The screenshot displays the 'Change Request page (2 of 2)' with the following sections:

- Product Information:** Includes tabs for 'Product' and 'Ownership'. Fields include 'Product Group' (Computer Hardware), 'Product' (Compass Notebook PC with DV), and 'Asset Tag'. A button 'Add Product Information' is present.
- Change Control:** Includes fields for 'Impact' (Minor), 'Release #', 'Change Owner', 'Category' (Minor), 'Resolution', 'Requested By Date' (08/27/2009), 'Start Date' (08/20/2009), 'Start Time' (2:00PM), 'End Date' (08/20/2009), and 'End Time' (4:00PM). A checkbox for '24/7 Schedule' is also shown.
- Phase Summary:** A table with columns: Phase, Status, Start Date, Start Time, End Date, and End Time. It lists three phases: Approval (Approved), Scheduling (Approved), and Implementation (Executing). Below the table are 'Template', 'Load', and 'Add Phase' buttons.
- Audit History:** A section at the bottom of the page.

Use the fields on this page to define the nature of the change you are proposing.

Use the Change Request section to record basic information associated to a change request, such as a summary, type, reason and priority.

**Description**

Manually enter a description of the change request, or enter a value by selecting a Text Tray value.

**Status**

Enter the status of the change request. Once a change request is associated with a status whose category is *Closed* or *Canceled*, the Audit History section of the page is updated with the date and time of that status change, as well as the userID and name of the person who made that change.

**Duration**

If the change request necessitates a service outage, specify the length of time for that outage in this field.

**Units**

Select the unit of time that applies to the number entered in the Duration field.

Use the Product Information section to manage the products and installed products that are associated to a change request.

**Product Group**

Select the desired product group.

**Product**

Select the desired product. This is a required field.

The choices available for product are limited to the appropriate setID, which is derived from the business unit of the change request. If a product group has already been specified, the available options for selecting a product are further limited to those within that product group.

The installed product entry (Asset Tag value) will be defaulted onto the page if one and only one installed product exists for the specified product for the person listed as the Change Requestor.

If you select a product and there are installed product entries associated with the product for multiple people, the system displays a link on far right side of the grid entitled *Affected Parties* to provide you with a way to display who has that product installed. This tells you who may be affected by the change request.

**Asset Tag**

Enter the desired asset tag number. You may prompt for valid installed product (asset) entries by using the lookup (magnifying glass) icon to the right of this field.



Click the Collect Attributes icon to display the Collect Attributes for Change Request page. The actual format and number of attributes will depend on what attributes (and their associated conditions) have been configured for a change request.



The disabled Collect Attributes icon is displayed if attributes are not enabled for change requests for that installed product. No attribute collection is possible for that row in the grid.

**From Owner (located on the Ownership tab of the Product Information grid)**

This field will display the current owner of the selected installed product.

**To Owner (located on the Ownership tab of the Product Information grid)**

Select the person to whom ownership of the installed product should be transferred. This value will default to the change request Requester unless the current owner identified for the installed product is already the Requester.

When a change request is saved with a Status set to a Category of *Closed*, the corresponding installed product entry will be updated with this person's name as the new owner.

Use the Change Control section to record important data associated to a change request, such as the impact, category and change requestor.

**Requested By Date**

Enter the requested completion date for the change request.

Use the Phase Summary section to manage the phases and tasks that are associated to a change request. Only phases appear in this grid. You can also view tasks and the phases that are associated to them from the Tasks page.

Each phase in the Phase Summary section consists of a task or set of tasks that needs to be completed for a change to be successful. Any required approvals should also be presented in the form of an approval task.

---

**Note:** The Text Tray option available on the change request Toolbar enables the user to quickly populate text tray entries into the Description on the main Change Request page.

---

See [Understanding Change Request Management](#).

## Collect Attributes for Change Request Page

Use the Collect Attributes for Change Request page (RG\_ATTR\_PROD\_SEC) to add or edit attributes to be associated for each installed product on a change request.

### Navigation

HelpDesk, Add Change Request

Click the Collect Attributes icon on the Manage Product grid of the main Change Request page.

### Image: Change Request: Collect Attributes for Change Request page

This example illustrates the fields and controls on the Change Request: Collect Attributes for Change Request page.

**Collect Attributes for Change Request**

<b>Product ID</b>	IT1026	<b>Description</b>	Compass Notebook PC with DVD
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**Processor**

**Processor**

**Processor Count**

**Processor Speed**

**Memory**

**RAM (MB)**

**Video RAM (MB)**

**Operating System**

**Operating System**

Enter the desired attribute values for each installed product (asset) entry listed on the Change Request page. When a change request is saved with a Status set to a Category of *Closed*, any non-blank attribute values from the change request will be copied to the identically named attributes of the corresponding installed product entry.

Attributes are user-defined and are associated independently to each permitted component. Only attributes that are associated to both the Change Request and Installed Product components (with similar conditions,

if any) will be considered when updating the installed product attributes upon saving a closed change request.

See "Understanding Attributes (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Add Change Request Page

Use the Add Change Request page (RG\_CHANGE\_REQ\_SS) to add new change requests in HelpDesk Self-Service.

### Navigation

Employee Self-Service, HelpDesk, Add Change Request

### Image: Add Change Request page

This example illustrates the fields and controls on the Add Change Request page.

The screenshot shows the "Add Change Request" page. At the top, the title "Add Change Request" is displayed in blue. Below it, a message states: "Enter the appropriate information below. To submit your change request, click the Submit button." The form is divided into two main sections: "Requester Information" and "Change Request".

**Requester Information**

- \*Business Unit**: A dropdown menu with "IT Help Desk" selected.
- Requester**: Fred Dobbs
- Phone**: 232-532/344-2451-2354

**Change Request**

- Status**: New
- \*Request Type**: Hardware
- Sub Type**: Desktop
- \*Priority**: Low
- \*Product**: Compass Notebook PC with DVD
- \*Summary**: Request memory upgrade (with a checkmark icon)
- Details**: Need more memory to run multiple applicatins: please add 2 gig memory (with a checkmark icon)

At the bottom of the form is a "Submit" button.

Use the fields on this page to define the nature of the change you are proposing. Many of the fields in the Change Request section are dependent on each other in that the values change based on your previous selection. Click Submit when you are finished.

## Manage Change Requests Page

Use the Manage Change Requests page (RG\_CHANGE\_SS\_SRCH) to search for and access change requests in HelpDesk Self-Service.

### Navigation

Employee Self-Service, HelpDesk, Manage A Change Request

### Image: Manage Change Requests page

This example illustrates the fields and controls on the Manage Change Requests page.

**Manage Change Requests**

**Find an existing Change Request**

Choose a predefined search criteria and click search.

**Search Criteria**

**Name Display** Fred Dobbs

**\*Predefined Search** All my change requests

**Search**

Changes				
Change Request	Summary	Owner	Status	Date Created
<a href="#">400004</a>	Request memory upgrade		New	08/21/2009 5:59PM

Select one of the predefined searches from the Predefined Search drop-down list box. Click Search. The system displays the change requests that match the search criteria you selected. Click the link under the Change Request column to access the change request you submitted.

## Managing Notes

This section discusses how to:

- Manage notes.
- View notes and attachments.

## Pages Used to Manage Notes

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Change Request - Notes	RG_CHANGE_NOTE	<ul style="list-style-type: none"> <li>HelpDesk, Add Change Request</li> </ul> <p>Click the Notes tab.</p> <ul style="list-style-type: none"> <li>HelpDesk, Add Case</li> </ul> <p>Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section, and then select the Notes page.</p>	Add notes and attachments to change requests.
View Note	RB_VIEW_NOTE_SEC	Select the notes you want to view and then click the View button on the Change Request - Notes page.	View the content of notes and attachments related to the change request.

## Change Request - Notes Page

Use the Change Request - Notes page (RG\_CHANGE\_NOTE) to add notes and attachments to change requests.

## Navigation

- HelpDesk, Add Change Request

Click the Notes tab.

- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Notes page.

## Image: Change Request: Notes page

This example illustrates the fields and controls on the Change Request: Notes page.

**Change Request** History Select One...

Save | 360-Degree View | Notification | Text Tray | Search | >> Personalize

**Change ID** 400004 **Requester** Fred Dobbs  
**Priority** Low **Type** Hardware

Change Request Notes (1) Tasks (0) History Related Changes (0) Related Actions (0) Go To Select One...

**Notes Summary** Customize | Find | View All | First 1 of 1 Last

Select	Subject and Details	Attachment(s)	Added By	Date Added
<input type="checkbox"/>	<a href="#">Awaiting approval for upgrade</a> Requested upgrade requires approval: submitted request on 08/21/09		Fred Dobbs	08/21/2009 6:03PM

☐ Check All / Clear All

**Audit History**

When adding a new note to the change request, the note Description field may be populated using a Text Tray entry.

Notes functionality is similar across all PeopleSoft CRM applications.

## Related Links

"Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## View Note Page

Use the View Note page (RB\_VIEW\_NOTE\_SEC) to view the content of notes and attachments related to the change request.



## Navigation

Select the notes you want to view and then click the View button on the Change Request - Notes page.

### Image: View Note page

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

**Note:** Use this page to view notes and attachments related to the change request. Click Return to go back to the Notes page.

## Managing Tasks

This section discusses how to manage tasks.

### Page Used to Manage Tasks

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Change Request - Tasks	RG_CHG_TASKS	<ul style="list-style-type: none"> <li>HelpDesk, Add Change Request</li> </ul> <p>Click the Tasks tab.</p> <ul style="list-style-type: none"> <li>HelpDesk, Add Case</li> </ul> <p>Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section, and then select the Tasks tab.</p>	Manage tasks in PeopleSoft Change Management.

### Change Request - Tasks Page

Use the Change Request - Tasks page (RG\_CHG\_TASKS) to manage tasks in PeopleSoft Change Management.

## Navigation

- HelpDesk, Add Change Request

Click the Tasks tab.

- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Tasks tab.

## Image: Change Request: Tasks page

This example illustrates the fields and controls on the Change Request: Tasks page.

**Change Request**

Save | 360-Degree View | Notification | Text Tray | Search | >> | Personalize

Change ID 400003 | Priority Medium | Requester Robert Harrison | Type Hardware

Change Request | Notes (0) | Tasks (18) | History | Related Changes (0) | Related Actions (0)

Tasks Details | Tasks Hierarchy | Go To Select One...

Task	Task Group	Phase	Status	Assignee	Start Date	End Date	
<a href="#">1187-Verify Request</a>	<a href="#">400027</a>	Assessment	Open	<a href="#">Assignee List</a>	05/21/2007	05/22/2007	
<a href="#">1188-Assess Risk</a>	<a href="#">400027</a>	Assessment	Open	<a href="#">Assignee List</a>	05/21/2007	05/22/2007	
<a href="#">1189-Categorize Request</a>	<a href="#">400027</a>	Assessment	Open	<a href="#">Assignee List</a>	05/21/2007	05/22/2007	
<a href="#">1190-Technical Approval</a>	<a href="#">400028</a>	Approval	Open	Joe Dillon	05/23/2007	05/28/2007	
<a href="#">1191-User Approval</a>	<a href="#">400028</a>	Approval	Open	Joe Dillon	05/23/2007	05/28/2007	
<a href="#">1192-Assign Resources</a>	<a href="#">400029</a>	Preparation	Open	<a href="#">Assignee List</a>	05/29/2007	06/12/2007	
<a href="#">1193-Create User Communication Plan</a>	<a href="#">400029</a>	Preparation	Open	<a href="#">Assignee List</a>	05/29/2007	06/12/2007	
<a href="#">1194-Create Backout Plan</a>	<a href="#">400029</a>	Preparation	Open	<a href="#">Assignee List</a>	05/29/2007	06/12/2007	
<a href="#">1195-Create Test Plan</a>	<a href="#">400029</a>	Preparation	Open	<a href="#">Assignee List</a>	05/29/2007	06/12/2007	
<a href="#">1196-Procure New Server</a>	<a href="#">400029</a>	Preparation	Open	<a href="#">Assignee List</a>	05/29/2007	06/12/2007	
<a href="#">1197-Schedule Downtime</a>	<a href="#">400030</a>	Scheduling	Open	<a href="#">Assignee List</a>	06/13/2007	06/28/2007	
<a href="#">1198-Notify Users</a>	<a href="#">400030</a>	Scheduling	Open	<a href="#">Assignee List</a>	06/13/2007	06/28/2007	
<a href="#">1199-Replace Email Server</a>	<a href="#">400031</a>	Implementation	Open	<a href="#">Assignee List</a>	06/29/2007	07/18/2007	
<a href="#">1200-Execute Test Plan</a>	<a href="#">400031</a>	Implementation	Open	<a href="#">Assignee List</a>	06/29/2007	07/18/2007	
<a href="#">1201-Notify Users</a>	<a href="#">400031</a>	Implementation	Open	<a href="#">Assignee List</a>	06/29/2007	07/18/2007	

Add a Task | View

Adding tasks in PeopleSoft Change Management is similar to the process that is used in PeopleSoft Support and HelpDesk. For instructions on using the Tasks page, see [Adding Tasks to a Case](#) and *"Managing Tasks (PeopleSoft CRM 9.2: Automation and Configuration Tools)"*.

## Reviewing Change Request History

This section provides an overview of change request history and discusses how to:

- View the event history of a change request.
- View the audit trail of a change request.

## Pages Used to Review Change Request History

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Change Request History - Events	RG_CHG_HISTORY	<ul style="list-style-type: none"> <li>• HelpDesk, Add Change Request  Select the Show more tabs button and then click the History page.</li> <li>• HelpDesk, Add Case  Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section. Select the Show more tabs button. Select the History page.</li> </ul>	View a summary of important events in the life cycle of a change request.
Change Request History - Audit	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.

## Understanding Change Request History

The Change Request History page includes an Events subpage and an Audit subpage:

- Change request history provides a summary of the major events in the life cycle of a change request.
- Change request auditing complements change request history processing by providing an automated mechanism for keeping a detailed change history without cluttering the Change Request History page.

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

### Change Request History Page

This page displays information about major events in the life of the change request, including a description of the event and details of any field changes that are associated with the event. The following mechanisms insert data into the change request history table:

- Change Request History AAF policy.

At save time, the system evaluates record- and field-level conditions that you define. When the condition is true, the system adds a row of change request history data.

- Workflow AAF policy (including service-level workflow).

The system triggers a workflow action under conditions that you define. The event processing definition includes a check box that you select if you want to create change request history when the workflow is triggered.

- Manual notifications.

The system adds change request history whenever a user sends a manual notification from the change request.

See "Understanding Manual Notifications (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Audit History Page

This page displays record-level changes to change request data. Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting). However, there is no conditional logic to evaluate the before and after values of the field. The system captures all audited actions regardless of the field value.

### Related Links

"Understanding Audit Information (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Understanding Interactions (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Prerequisite

Your organization must define event sets that tell the system which events to capture on the Change Request - History page.

### Related Links

"Understanding Audit Information (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Case History Configuration Page (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Change Request History - Events Page

Use the Change Request History - Events page (RG\_CHG\_HISTORY) to view a summary of important events in the life cycle of a change request.

## Navigation

- HelpDesk, Add Change Request

Select the Show more tabs button and then click the History page.

- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section. Select the Show more tabs button. Select the History page.

## Image: Change Request History - Events page

This example illustrates the fields and controls on the Change Request History - Events page.

**Change Request**

Save | 360-Degree View | Notification | Text Tray | Search | >> Personalize

Change ID 400003 Requester Robert Harrison  
Priority Medium Type Hardware

Change Request | Notes (0) | Tasks (18) | History | Related Changes (0) | Related Actions (0) | Go To Select One...

**Events** | Interactions | Audit

Date	Details	Name
06/27/2007 2:08AM	Change Request status changed to Approved. Email sent to Requester.	
06/27/2007 2:08AM	Status changed to Approved. Email sent to Change Owner and Interested Parties.	
06/27/2007 2:08AM	All tasks tied to phase of NULL are now complete. Email sent to Change Owner.	
06/27/2007 2:10AM	All tasks tied to phase of NULL are now complete. Email sent to Change Owner.	
06/27/2007 2:19AM	All tasks tied to phase of NULL are now complete. Email sent to Change Owner.	
06/28/2007 11:15PM	All tasks tied to phase of Assessment are now complete. Email sent to Change Owner.	
07/07/2007 9:56AM	All tasks tied to phase of Assessment are now complete. Email sent to Change Owner.	

Refresh

Audit History

### Audit

Click to display the Audit History page.

### Events

Describes the event.

These fields are either populated through AAF processing or whenever a user sends a manual notification from the change request.

## Change Request History - Audit Page

Use the Change Request History - Audit page (RG\_CHG\_HISTORY) to view detailed information about changes to specific fields in the change request.

## Navigation

Click the Audit link on the Change Request History page.

### Image: Change Request History - Audit page

This example illustrates the fields and controls on the Change Request History - Audit page.

### Change Request

[Save](#) | [360-Degree View](#) | [Notification](#) | [Text Tray](#) | [Search](#) | [Personalize](#)

**Change ID** 400003      **Requester** [Robert Harrison](#)  
**Priority** Medium      **Type** Hardware

[Change Request](#) | [Notes \(0\)](#) | [Tasks \(18\)](#) | [History](#) | [Related Changes \(0\)](#) | [Related Actions \(0\)](#)

[Events](#) | [Interactions](#) | **Audit**

Go To

Audit History						
Record Name	Field Name	Action Taken	Date and Time Stamp	Changed By	Value Before Change	Value After Change
RG_CHANGE_REQST	RG_SUMMARY	Change Old (PPR Only)	07/07/2007 9:56:49AM PDT		Change Request created with BU as IT HELPDESK	Change Request For a Hardware Upgrade
RG_CHANGE_REQST	DESCRLONG	Change Old (PPR Only)	07/07/2007 9:56:49AM PDT			Change Request For a Hardware Upgrade
RG_CHANGE_REQST	END_DT	Change Old (PPR Only)	06/28/2007 11:16:33PM PDT			2007-08-08
RG_CHANGE_REQST	BO_ID_OWNER	Change Old (PPR Only)	06/27/2007 2:19:47AM PDT		0	20098
RG_CHANGE_REQST	RG_CATEGORY	Change Old (PPR Only)	06/27/2007 2:10:48AM PDT		SIGN	MINR

[Refresh](#)

▶ Audit History

Your organization chooses which fields in the record to audit and the types of changes to capture (adding, updating, displaying, or deleting).

## Managing Related Changes

This section discusses how to manage related changes.

## Page Used to Manage Related Changes

Page Name	Definition Name	Navigation	Usage
Change Request - Related Changes	RG_REL_CHANGES	<ul style="list-style-type: none"> <li>HelpDesk, Add Change Request  Click the Related Changes tab.</li> <li>HelpDesk, Add Case  Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section, and then select the Related Changes page.</li> </ul>	Relate your change request to another change request.

## Change Request - Related Changes Page

Use the Change Request - Related Changes page (RG\_REL\_CHANGES) to relate your change request to another change request.

### Navigation

- HelpDesk, Add Change Request

Click the Related Changes tab.

- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Related Changes page.

### Image: Change Request: Related Changes page

This example illustrates the fields and controls on the Change Request: Related Changes page.

**Change Request**

Save | 360 360-Degree View | Notification | Text Tray | Search | >> Personalize

Change ID 400003 Requester Robert Harrison  
Priority Medium Type Hardware

Change Request Notes (0) Tasks (18) History Related Changes (1) Related Actions (0)

Go To Select One...

Relationship	Type	Change ID	Summary	Status	Date and Time Added	Added By	
Child	Common	<a href="#">400002</a>	Change Request For a Hardware Fix	In Review	08/21/2009 6:21PM	TEST	

Add Related Change

Audit History

Managing related changes in PeopleSoft Change Management is similar to the process that is used to manage related cases, which is described in the documentation for PeopleSoft Support and HelpDesk.

## Related Links

[Managing Related Cases](#)

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# Managing Related Actions

This section discusses how to manage related actions.

## Page Used to Manage Related Actions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Change Request - Related Actions	RG_REL_OBJECTS	<ul style="list-style-type: none"><li>HelpDesk, Add Change Request  Click the Related Actions tab.</li><li>HelpDesk, Add Case  Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section, and then select the Related Actions page.</li></ul>	Relate actions to the change request.

## Change Request - Related Actions Page

Use the Change Request - Related Actions page (RG\_REL\_OBJECTS) to relate actions to the change request.



## Navigation

- HelpDesk, Add Change Request

Click the Related Actions tab.

- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Related Actions page.

## Image: Change Request - Related Actions page

This example illustrates the fields and controls on the Change Request - Related Actions page.

**Change Request**

Save | 360 360-Degree View | Notification | Text Tray | Search | >> Personalize

Change ID 400003 Requester Robert Harrison  
Priority Medium Type Hardware

Change Request Notes (0) Tasks (18) History Related Changes (1) Related Actions (1) Go To Select One...

Type	Id	Summary	Date and Time Added	Added By
Help Desk Case	<a href="#">220341</a>	My computer won't start. This occurred after having performance problems a...	08/21/2009 6:23PM	TEST

Type Add Related Action

Audit History

Managing related actions in PeopleSoft Change Management is similar to the process that is used to manage related actions in PeopleSoft Support and HelpDesk.

## Related Links

[Managing Related Actions](#)

# Managing Interested Parties

This section discusses how to manage interested parties for a change request.

## Pages Used to Manage Interested Parties

Page Name	Definition Name	Navigation	Usage
Change Request - Interested Parties	RG_CHG_INT_PARTY	<ul style="list-style-type: none"> <li>HelpDesk, Add Change Request</li> <li>Click the Interested Parties tab.</li> <li>HelpDesk, Add Case</li> <li>Select <i>Change Request</i> from the Related Actions drop-down list box in the Actions section, and then select the Interested Parties page.</li> </ul>	Manage interested parties in a change request.

### Change Request - Interested Parties Page

Use the Change Request - Interested Parties page (RG\_CHG\_INT\_PARTY) to manage interested parties in a change request.

#### Navigation

- HelpDesk, Add Change Request

Click the Interested Parties tab.

- HelpDesk, Add Case

Select *Change Request* from the Related Actions drop-down list box in the Actions section, and then select the Interested Parties page.

#### Image: Change Request - Interested Parties page

This example illustrates the fields and controls on the Change Request - Interested Parties page.

**Change Request**

Save | 360 360-Degree View | Notification | Text Tray | Search | >> Personalize

Change ID 400003  
Priority Medium

Requester Robert Harrison  
Type Hardware

Notes (0) | Tasks (18) | History | Related Changes (1) | Related Actions (1) | Interested Parties (2)

Go To Select One...

Name	Email Address	Phase
Terry Murphy	crm_worker_34@ap6023fems.us.oracle.com	Review
Spencer Underwood	sunderwood@gbi.com	Scheduling

Add an Interested Party

Audit History

Managing interested parties in PeopleSoft Change Management is similar to the process that is used to manage interested parties in PeopleSoft Support and HelpDesk.

**Related Links**

[Identifying Interested Parties](#)



# Managing Defects and Fixes

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## Understanding Defect and Fix Tracking

Flaws and functional shortcomings can occur in all products. Within PeopleSoft Quality Management, both product flaws and proposed enhancements are *defects*, and resolutions to both are *fixes*.

Use PeopleSoft Quality Management to track reported defects and enhancement requests and to record how requests are resolved. Automated worklist assignments and notifications move the defect through the resolution process. Managers, engineers, call center operators, and others can use the search tool to quickly identify and access records.

Use PeopleSoft Quality Management to:

- Identify defects associated with particular products or components.
- Monitor the progress of defects as they move forward to resolution.
- Advise support personnel and customers about fixes that have not yet been applied.
- Identify component problems affecting multiple products or versions.
- Log product enhancement requests made by customers and quality assurance engineers.
- Monitor requirements for quality certification processes such as ISO 9000.
- Measure product quality, identify defect trends, and assess customer satisfaction.

You can maintain a record of fixes to facilitate quick resolutions to similar defects and related cases. Use the record of fixes to:

- Reduce the possibility of fixing the same problem twice.
  - Provide links to other defect records and quickly identify similar problems.
  - Provide a detailed history of when a defect was fixed, the effort involved, and the versions affected.
- 

## Entering Defects

This section discusses how to:

- Define defects.
- Add notes and attachments to a defect.
- Link defects to fixes.

- Work with solutions.
- Identify affected products.
- Add interested parties.
- Link related cases and change requests.
- View related defects.
- Link related defects.
- Identify tested environments.
- View workflow history.

## Pages Used to Enter Defects

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Quality Management - Defect	RQ_DEFECT_MAIN	Quality Management, Add Defect, Defect Quality Management, Search Defects, Defect	Enter detailed information about the defect, product, responsible parties, interested parties, environment, and defect resolution.
Quality Management - Notes	RQ_DEFECT_NOTE	Quality Management, Add Defect, Notes Quality Management, Search Defects, Notes	Add notes and attachments to a defect, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.
Quality Management - Fixes	RQ_DEFECT_FIX_LNKS	Quality Management, Add Defect, Fixes Quality Management, Search Defects, Fixes	Link new or existing fixes to a defect.
Quality Management - Solutions	RQ_DEFECT_SOL_LNK2	Quality Management, Add Defect, Solutions Quality Management, Search Defects, Solutions	Search for solutions to the defect or problem.
Quality Management - Products Affected	RQ_DEFECT_AFFD_PRD	Quality Management, Add Defect, Products Affected Quality Management, Search Defects, Products Affected	Identify and enter information about additional products that are affected by the defect. You can list multiple products.
Quality Management - Interested Parties	RQ_DEFECT_INTR	Quality Management, Add Defect, Interested Parties Quality Management, Search Defects, Interested Parties	Identify people who want to be notified regarding defect resolution progress.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Quality Management - Related Actions	RQ_DEF_CASE_LNK	Quality Management, Add Defect, Related Actions  Quality Management, Search Defects, Related Actions	Link the defect to related support or help desk cases.
Quality Management - Related Defects	RQ_DEF_RELATIONS	Quality Management, Add Defect, Related Defects  Quality Management, Search Defects, Related Defects	View information about related defects, associate defects that can be resolved by the same fix, and identify defects that must be resolved in a particular sequence.
Relate Existing Defect - Relationship	RQ_REL_TYPE_SEC	Quality Management, Add Defect, Related Defects. Click the Relate Existing Defect button.  Quality Management, Search Defects Click the Relate Existing Defect button.	Specify how defects are related to one another.
Quality Management - Tested Environments	RQ_DEFECT_TEST_ENV	Quality Management, Add Defect, Tested Environments  Quality Management, Search Defects, Tested Environments	Identify and enter information about the environments in which the defect will be tested.
Quality Management - Workflow History	RQ_WL_ACTN_HISTORY	Quality Management, Add Defect, Workflow History  Quality Management, Search Defects, Workflow History	View workflow status and priority history resulting from worklist notifications.

## Quality Management - Defect Page

Use the Quality Management - Defect page (RQ\_DEFECT\_MAIN) to enter detailed information about the defect, product, responsible parties, interested parties, environment, and defect resolution.

## Navigation

Quality Management, Add Defect, Defect

Quality Management, Search Defects, Defect

### Image: Quality Management - Defect page (1 of 2)

This example illustrates the fields and controls on the Quality Management - Defect page (1 of 2).

**Quality Management**

Save Refresh | Notification | Clone | Search | Personalize

Defect Id NEXT Status OPEN  
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions

**Defect Information**

\*Date Reported08/21/2009

Reported ByStu Marx

\*TypeDefect

\*SubjectSystem not responding

DescriptionSystem not responding - no packets sent thru network

Duplicate of

Duplicate Subject

\*Business UnitHigh Tech

\*StatusOpen

\*StateUnassigned

\*ReasonMust Fix

\*PriorityMedium

Severity

Date Resolved

**Product Information**

\*ProductGBI 8200 Series Router

\*Production ID8200 SERIES V1

Version8200 Series Version 1

Component ID

\*SymptomSystem hangs

\*Product ImpactDegraded

PhaseProduction

Suspect. CauseUnknown

RepeatabilityReproducible

Verified On08/21/2009

Verified By



## Image: Quality Management - Defect page (2 of 2)

This example illustrates the fields and controls on the Quality Management - Defect page (2 of 2).

The screenshot displays the 'Quality Management - Defect page (2 of 2)'. It features a table for 'Responsible Parties' with columns for Name and Role. Below the table is a section for 'Environment' with fields for OS, Platform, UI, Label, OS Version, Environment, and Network. At the bottom is an 'Audit History' section.

Responsible Parties	
Name	Role
<input type="radio"/> Jake Lu	Quality Analyst
<input type="radio"/> Jake Lu	Quality Developer
<input type="radio"/> Colleen Mott	Quality Development Manager
<input type="radio"/> Maggie Stone	Quality Manager

Currently assigned to this defect. | Add a Responsible Party

**Environment**

OS: Windows NT | Label: GBI Netplus V9.1  
Platform: HP 9000 | OS Version:   
UI: | Environment: MS SQL Server  
Network: NetWare v3.x

**Audit History**

The Quality Management - Defect page contains information relevant to problem reporting and resolution. As the defect moves through to the resolution process, you can track its status on this page.

## Defect Information

### Date Reported

Enter the date on which the defect or enhancement request is reported.

### Reported By

Select the name of the person reporting the defect or enhancement request. The name of the user who opened the defect issue appears by default.

### Type

Select a type. Values are:

*Defect:* Relates to a problem or malfunction. The standard response to a defect is a fix.

*Enhancement:* Relates to a request for new functionality. The standard response to this request is an enhancement.

### Subject

Enter details about the defect being reported.

### Status

Select the status of the defect or enhancement request. PeopleSoft delivers *Open* and *Closed*. You can define other options during setup.

### State

Select a state that more fully describes your status selection. The system delivers several options. You can change these options or define others during setup. Available states are dynamic depending on the selected status.

<b>Reason</b>	Select a reason that further describes the status and state selections. Available reasons are dynamic depending on the selected status and state.
<b>Priority</b>	Select a priority for the defect. PeopleSoft delivers <i>High</i> , <i>Low</i> , and <i>Medium</i> with the system.
<b>Severity</b>	Select the severity of the defect. PeopleSoft delivers <i>High</i> , <i>Low</i> , and <i>Medium</i> with the system.
<b>Duplicate of</b>	<p>If similar defect or enhancement requests already exist, select the principal defect here to designate the current defect as a duplicate of the principal defect.</p> <p>For example, if, after creating a new defect record, you find that a defect has already been reported but not described in quite the same way, specify the current record as a duplicate of the previous record and change the status of the current record to closed.</p>
<b>Product Information</b>	
<b>Product</b>	<p>Select the product to which the defect or enhancement request relates.</p> <hr/> <p><b>Note:</b> Only products with a valid version definition, established in PeopleSoft Quality Management setup, appear in the search. If a product does not appear, a version for that product must be established in setup.</p> <hr/>
<b>Production ID</b>	<p>Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search. When you select a valid production ID, the system automatically fills in the version in the Version field.</p>
<b>Version</b>	Once a user selects a production ID, the system automatically displays the version label.
<b>Component ID</b>	Click the Component Hierarchy button to access the Component Descriptions page and select the appropriate component.
<b>Symptom</b>	<p>Select a symptom that may have alerted you to the defect. Define symptoms in PeopleSoft Quality Management setup.</p>
<b>Product Impact</b>	Describe the impact of the defect on your component. Values are: <i>Affected - Use Workaround</i> , <i>Degraded</i> , <i>Unaffected</i> , and <i>Unusable</i> .
<b>Phase</b>	Select the production phase in which the product failure or enhancement request occurred. Values are: <i>Alpha</i> , <i>Analysis/Design</i> , <i>Beta</i> , <i>Concept</i> , <i>Implementation</i> , <i>Maintenance</i> , <i>Production</i> , <i>Requirements</i> , and <i>Retirement</i> .

<b>Suspect. Cause (suspected cause)</b>	Select a suspected cause of the defect. Define suspected causes in PeopleSoft Quality Management setup.
<b>Repeatability</b>	Select the regularity with which the failure can be reproduced. Values are: <i>Intermittent</i> , <i>One time occurrence</i> , <i>Recurring</i> , and <i>Reproducible</i> .

## Responsible Parties

Responsible parties are those who take the lead for one or more steps in the defect resolution process and are linked to the product version definition during version setup. These values are automatically populated when a user selects the product version. You can add or delete responsible parties as needed.

You can use information about responsible parties to control search functions and role-related workflow. To modify workflow processing use AAF policies.

<b>Currently assigned to this defect</b>	Select this option to indicate who is responsible for the defect's progress at any point. For example, if the current state of the defect resolution is <i>To Test</i> , the person assigned would be the quality analyst. When defined, the system sends workflow messages as the status is changed and saved.
--	---

---

**Note:** Selecting an assignment is a manual process. You can select only one name as the responsible party at any point. As the defect-resolution process progresses, the responsible party changes.

---

<b>Add a Responsible Party</b>	Click to add a new row to the Responsible Parties grid.
--------------------------------	---

## Environment

This section is used primarily for software problems.

<b>OS (operating system)</b>	Select the operating system of the environment in which the product failed if it is not automatically populated, or to modify operating system information.
------------------------------	---

<b>Label</b>	Enter the environment information that is linked to the version during version setup.
--------------	---

---

**Note:** If there are multiple environment sets linked to a version, the Select an Environment button appears. Also, if only one environment exists that is linked to the versions, the system automatically inserts values into the fields on the page.

---

<b>Platform</b>	Select the type of computer on which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify platform information.
-----------------	---

**OS Version (operating system version)**

Enter the version of the environment in which the product failed if it is not automatically populated, or to modify operating system information.

**UI (user interface)**

Select the type of user interface through which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify user interface information.

**Environment**

Select the database management environment in which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify environment information.

**Network**

Select the type of network on which the defect was found. Do this only if the system does not automatically populate this field or if you want to modify network information.

## Quality Management - Notes Page

Use the Quality Management - Notes page (RQ\_DEFECT\_NOTE) to add notes and attachments to a defect, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

**Navigation**

Quality Management, Add Defect, Notes

Quality Management, Search Defects, Notes

**Image: Quality Management - Notes page**

This example illustrates the fields and controls on the Quality Management - Notes page.

**Quality Management**

Save Refresh | Notification Clone Search | Personalize

Defect Id NEXT Status OPEN  
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions

**Notes Summary** Customize Find View All First 1 of 1 Last

Select	Subject and Details	Attachment(s)	Added By	Date Added
<input type="checkbox"/>	Need to replace router Router defective - replace and test		Stu Marx	08/21/2009 7:54AM

☐ Check All / Clear All

Email View Add Note

The process of adding notes and attachments is similar across all PeopleSoft applications.

For instructions on adding notes and attachments, see "Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".

## Quality Management - Fixes Page

Use the Quality Management - Fixes page (RQ\_DEFECT\_FIX\_LNKS) to link new or existing fixes to a defect.

### Navigation

Quality Management, Add Defect, Fixes

Quality Management, Search Defects, Fixes

### Image: Quality Management - Fixes page

This example illustrates the fields and controls on the Quality Management - Fixes page.

**Quality Management**

Save Refresh | Add Defect | Notification | Clone | Search | Next | Personalize

**Defect Id** DEF000000300001 **Status** OPEN  
**Priority** Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions

**Fixes Linked To This Defect** Customize Find | First 1 of 1 Last

Fix ID	Subject
<input type="text" value="FIX000000300001"/>	The power supply in an affected 8200 Series Router may short out if the unit is turned on its side during operation

Add a Link to Fix Search Fixes

As fixes are implemented to resolve the defect, use the Quality Management - Fixes page to both create a fix and link the defect to the fix. This provides an immediate link to all fixes that resolve the defect in full or in part. Alternately, link the defect to the fix using the Quality Management - Defects page in the Fix component. Having fix information linked to a defect record enables call center operators to refer customers to available fixes that might not have been installed.

PeopleSoft Search is used to perform search on fixes. Refer to "Understanding PeopleSoft Search Framework Definitions for CRM (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)" and "Understanding PeopleSoft Search Framework Definitions for CRM (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)" topics for more information on using PeopleSoft Search in CRM.

### Subject

Displays the subject description associated with the fixes linked to this defect. The system populates this field with the subject information that you entered on the Quality Management - Fix page in the Fix component.

## Quality Management - Solutions Page

Use the Quality Management - Solutions page (RQ\_DEFECT\_SOL\_LNK2) to search for solutions to the defect or problem.

## Navigation

Quality Management, Add Defect, Solutions

Quality Management, Search Defects, Solutions

### Image: Quality Management - Solutions page

This example illustrates the fields and controls on the Quality Management - Solutions page.

**Quality Management**

Save Refresh | Add Defect | Notification | Clone | Search | Next | Personalize

Defect ID DEF000000300001 Status OPEN  
Priority Medium

Defect Notes Fixes **Solutions** Products Affected Interested Parties Related Actions

**Attempted Solutions** Customize Find View All First 1 of 1 Last

Select	Solution ID	Description	Date Modified	Added By	Status
<input type="checkbox"/>	301236	<a href="#">Troubleshooting tips for router hang</a> This solution helps troubleshoot a router that is not responding, the cause, and what s...	08/21/2009 4:13:55PM PDT	TEST	In Consideration

L View

**Solutions**

Search Text router Troubleshooting tips

Search Advanced Search Search Tips Preferences

Your search returned 2 result(s). Customize Find View All First 1-2 of 2 Last

Select	Score%	Type	ID	Description
<input checked="" type="checkbox"/>	82	Solution	301236	<a href="#">Troubleshooting tips for router hang</a> This solution helps troubleshoot a router that is not responding, the cause, and what should be done to try to eliminate the problem. A router ap... <a href="#">More like this...</a>
<input type="checkbox"/>	82	Solution	301237	<a href="#">Troubleshooting tips for router memory problems</a> This solution explains the symptoms and possible causes of memory allocation failure (MALLOCFAIL), and offers guidelines for troubleshooting memo... <a href="#">More like this...</a>

L Attempt Solve View

PeopleSoft CRM call center, field service and quality management applications enable you to track both the final solution—the one that resolved the caller's problem—and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

See "Understanding Solutions (*PeopleSoft CRM 9.2: Services Foundation*)".

## Quality Management - Products Affected Page

Use the Quality Management - Products Affected page (RQ\_DEFECT\_AFFD\_PRD) to identify and enter information about additional products that are affected by the defect.

You can list multiple products.

## Navigation

Quality Management, Add Defect, Products Affected

Quality Management, Search Defects, Products Affected

### Image: Quality Management - Products Affected page

This example illustrates the fields and controls on the Quality Management - Products Affected page.

**Quality Management**

Save Refresh | Add Defect | Notification | Clone | Search | Next | Personalize

Defect Id DEF000000300001 Status OPEN  
Priority Medium

Defect Notes Fixes Solutions **Products Affected** Interested Parties Related Actions

**Products Affected By This Defect** Find | View All First 1 of 1 Last

Product GBI 8200 Series Router Product ID HT8200  
Production ID 8200 SERIES V1 Version 8200 Series Version 1  
Component ID AC POWER SUPPLY Name  
Test Status Failed  
Details not responding

Modified 10/11/2002 5:12PM PDT HITECHSAMPLE

Complete this page if this defect or enhancement affects other products or components. For example, if you have a product that more than one appliance uses, use this page to list all appliances that contain the product.

#### Product

Select the product in which the defect is found.

#### Product ID

Once you select a product, the system displays the product ID.

#### Production ID

Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.

#### Version

Once you select a production ID, the system displays the version label.

#### Component ID

Select the appropriate component for this product and version.

#### Name

Select the name of the person who found the defect.

#### Test Status

Select the test status. Values are: *Failed*, *Not Tested*, and *Passed*.

#### Details

Describe the impact of the defect on the component.

## Quality Management - Interested Parties Page

Use the Quality Management - Interested Parties page (RQ\_DEFECT\_INTR) to identify people who want to be notified regarding defect resolution progress.

### Navigation

Quality Management, Add Defect, Interested Parties

Quality Management, Search Defects, Interested Parties

### Image: Quality Management - Interested Parties page

This example illustrates the fields and controls on the Quality Management - Interested Parties page.

**Quality Management**

Save Refresh | Add Defect | Notification | Clone | Search | Next | Personalize

Defect Id DEF000000300001 Status OPEN  
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions

**Interested parties** Customize Find First 1-2 of 2 Last

Name	Email Address
Perry Davidson	pdavidson@peoplesoft.com
Stu Marx	smarx@peoplebank_psft.com

Add an Interested Party

Interested parties want to be notified regarding the defect resolution progress, but are not designated as responsible parties. Interested parties can be either employees or non-employees—for example, customers. As with responsible parties, information pertaining to interested parties controls role-related workflow.

## Quality Management - Related Actions Page

Use the Quality Management - Related Actions page (RQ\_DEF\_CASE\_LNK) to link the defect to related support or help desk cases.



## Navigation

Quality Management, Add Defect, Related Actions

Quality Management, Search Defects, Related Actions

### Image: Quality Management - Related Actions page

This example illustrates the fields and controls on the Quality Management - Related Actions page.

**Quality Management**

Save Refresh | Add Defect | Notification | Clone | Search | Next | Personalize

Defect Id DEF000000300001 Status OPEN  
Priority Medium

Defect Notes Fixes Solutions Products Affected Interested Parties Related Actions

**Related Actions** Customize Find First 1 of 1 Last

Type	ID	Summary	Date and Time Added	Added By
Case	220347	Complaint that the router software has too many bugs.	08/21/2009 4:20PM	TEST

Type Case Add Related Action

Linking a defect to related cases enables call center agents to track a defect throughout the resolution process and to track cases that can be resolved by the same fix. This also enables quality assurance analysts to gain additional information about a case.

<b>Type</b>	Displays the type of related action.
<b>ID</b>	Displays the ID of the related action.
<b>Summary</b>	Displays the details of the action.
<b>Date and Time Added</b>	Displays the date and time when the action and the defect were linked.
<b>Added By</b>	Displays the name of the person who linked the action to the defect.
<b>Type</b>	Select the type of action to relate. Values include <i>Case</i> , <i>Change Request</i> , and <i>Create Change Request</i> . Selecting <i>Create Change Request</i> and clicking the Add Related Action button takes you to the Change Request page.

## Quality Management - Related Defects Page

Use the Quality Management - Related Defects page (RQ\_DEF\_RELATIONS) to view information about related defects, associate defects that can be resolved by the same fix, and identify defects that must be resolved in a particular sequence.

## Navigation

Quality Management, Add Defect, Related Defects

Quality Management, Search Defects, Related Defects

### Image: Quality Management - Related Defects page

This example illustrates the fields and controls on the Quality Management - Related Defects page.

**Quality Management**

Save Refresh | Add Defect Notification Clone Search Next | Personalize

Defect Id DEF000000300001 Status OPEN  
Priority Medium

Interested Parties Related Actions **Related Defects** Tested Environments Workflow History

Related Defects						
Relationship	Type	Defect	Subject	Date and Time Added	Added By	
Equivalent	Equivalent	<a href="#">DEF000000300002</a>	GBI 6400 Series VPN Router orders between February 1, 2002, and March 1, 2002 were shipped from manufacturing with 32MB of flash memory instead of the default 64MB of flash memory.	08/21/2009 4:22PM	TEST	

Relate a Defect

Use the Quality Management - Related Defects page to view other defects that have been linked to the subject defect. Also, link new defects by clicking the Relate a Defect button.

### Relate a Defect

Click to access the Relate Existing Defect page and link an existing defect record to the new defect.

## Relate Existing Defect - Relationship Page

Use the Relate Existing Defect - Relationship page (RQ\_REL\_TYPE\_SEC) to specify how defects are related to one another.

## Navigation

Quality Management, Add Defect, Related Defects. Click the Relate Existing Defect button.

Quality Management, Search Defects Click the Relate Existing Defect button.

### Image: Relate Existing Defect page

This example illustrates the fields and controls on the Relate Existing Defect page.

Linking related defects shows how a defect affects or is affected by other defects. For example, the hard drives on the new computer model that you are building can't be accessed. The floppy drives on the new model can't be accessed either. As the engineers study the problems, they find that the controller module on the motherboard is designed incorrectly and is responsible for the drive problems. The engineers enter a third defect record and link the two drive defect records as children to the motherboard defect.

### Relationship Type

Select the appropriate relationship type to describe the relationship between the defects. You define relationship types in setup. PeopleSoft provides sample values. You can change them or add new values to fit your needs. Also, select the labels that describe the role of each defect in the relationship.

For example, use a relationship type of *Common* to indicate that a defect in one component causes a defect in another component. In this example, the defect in the first component that causes the problem in the second component is the *Parent*, while the second defect is the *Child*. If problems in two or more components are caused by the same defect but there is not a parent and child relationship, the relationship type is *Equivalent* and all linked defects are *Equal*.

---

**Note:** All relationship-type labels that are established under a particular setID appear. However, you can select and save labels appropriate to the specified relationship type only.

---

## Quality Management - Tested Environments Page

Use the Quality Management - Tested Environments page (RQ\_DEFECT\_TEST\_ENV) to identify and enter information about the environments in which the defect will be tested.

Navigation

Quality Management, Add Defect, Tested Environments

Quality Management, Search Defects, Tested Environments

Image: Quality Management - Tested Environments page

This example illustrates the fields and controls on the Quality Management - Tested Environments page.

Quality Management

Save

Refresh

Add Defect

Notification

Clone

Search

Next

Personalize

Defect Id

DEF000000300001

Status

OPEN

Priority

Medium

Interested Parties

Related Actions

Related Defects

Tested Environments

Workflow History

Environments in which this defect has been tested

Find | View All | First | 1 of 1 | Last

Environment Label

NETWORK OPS

Type

Reproduced

OS

Unix

OS Version

Environment

DB2

Platform

HP 9000

Network

Winsock TCP/IP

UI

Name

Details

router problem - missing packets

Date Created

08/21/2009 4:28PM PDT TEST

Last Modified

08/21/2009 4:28PM PDT TEST

For software defects, it is important to know which environments the defects occurred in. Enter details about as many environment combinations as needed.

- Environment Label

Enter a name to identify the tested database management system environment.
- Type

Select an environment type, which relates to reproduction status. Values are: *Not Reproduced*, *Partially Reproduced*, and *Reproduced*.
- OS (operating system) and OS Version (operating system version)

Select or enter the operating system and version of the test environment.
- Environment

Select the database management system environment in which the test component resides.
- Platform

Select the computer processor type.
- Network

Select the type of network on which users utilize the product.
- UI (user interface)

Select the type of user interface through which users access the component.

<b>Name</b>	Select the person who conducted the testing in the stated environment.
<b>Description</b>	Describe the testing environment or the tests that were conducted.

## Viewing Workflow History

Use the Quality Management - Workflow History page (RQ\_WL\_ACTN\_HISTORY) to view workflow status and priority history resulting from worklist notifications.

### Navigation

Quality Management, Add Defect, Workflow History

Quality Management, Search Defects, Workflow History

### Image: Quality Management - Workflow History page

This example illustrates the fields and controls on the Quality Management - Workflow History page.

Quality Management					
Save Refresh <<   Previous		Personalize			
Defect Id DEF000000300003		Status OPEN			
Priority Medium					
<a href="#">Interested Parties</a> <a href="#">Related Actions</a> <a href="#">Related Defects</a> <a href="#">Tested Environments</a> <a href="#">Workflow History</a>					
Work list Routing History					
Date/Time	From User	To User	Priority	Status	State
02/08/2006 2:00PM	Lee,Burt	Avery,Quentin	Medium	Open	To Fix

The Worklist Routing History grid displays a record of all workflow related to defect record status changes.

<b>Date/Time</b>	Displays the date and time when a worklist notification was saved.
<b>From User and To User</b>	Displays the users who triggered and received the worklist notification.
<b>Priority, Status, and State</b>	Displays the priority code, status, and status state of the defect when the worklist notification was saved.
<b>Refresh Grid</b>	Click to reflect recent changes to workflow history.

## Recording Fixes and Linking Them to Defects

This section discusses how to:

- Enter and update fix information.

- Link defects to fixes.
- Add notes and attachments to a fix.

## Pages Used to Record Fixes and Link Them to Defects

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Quality Management - Fix	RQ_FIX_MAIN	Quality Management, Add Fix, Fix  Quality Management, Search Fixes, Fix	Enter and update detailed information about a fix.
Quality Management - Defects	RQ_FIX_DEFECT_LNKS	Quality Management, Add Fix, Defects  Quality Management, Search Fixes, Defects	Link defects with fixes. You can link multiple defects to a single fix.
Quality Management - Notes	RQ_FIX_NOTE	Quality Management, Add Fix, Notes  Quality Management, Search Fixes, Notes	Add notes and attachments to a fix, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

### Quality Management - Fix Page

Use the Quality Management - Fix page (RQ\_FIX\_MAIN) to enter and update detailed information about a fix.

## Navigation

Quality Management, Add Fix, Fix

Quality Management, Search Fixes, Fix

## Image: Quality Management - Fix page

This example illustrates the fields and controls on the Quality Management - Fix page.

**Quality Management**

Save Refresh | Add Fix | Notification | Clone | Search | Personalize

Fix ID: FIX000000300001 Subject: The power supply in an affected...

Fix Defects Notes

**Fix Information**

\*Subject: The power supply in an affected 8200 Series Router may short out if the unit is turned on its Business Unit: High Tech

Description: When the power supply is shorted out, the 8200 Series Router will cease functioning immediately or will fail to power on after being turned off at a later time. There is no safety hazard; the electric discharge is contained within the power supply. Some 8200 Series Router models manufactured from November 2001 through February 2002 have defective AC power...

Completed By: Alex Zulli Test Status: Passed

Completed On: 10/01/2002 Fix Time (Hrs.Mins): 0.50

Complexity: Easy Confidence: High

\*Product: GBI 8200 Series Router Verified By: Alex Zulli

Production ID: 8200 SERIES V1

Version: 8200 Series Version 1

Component ID: AC POWER SUPPLY

Verified On: 10/01/2002

First Found In: 8200 SERIES V1

Fixed In: 8200 SERIES V1

Verified In: 8200 SERIES V1

Audit History

### Subject

Enter a brief description of the fix.

### Completed By

Select the person who completed the fix.

### Test Status

Select the testing status of the fix. Values are: *Failed*, *In Progress*, *Partially Passed*, *Passed*, and *Pending*.

### Fix Time (Hrs. Mins) (fix time [hours and minutes])

Enter the approximate time required to complete the fix.

### Complexity

Select the level of fix complexity. Values are: *Easy*, *Medium*, *Trivial*, and *Very Complex*.

### Confidence

Select the level of confidence in the fix. Values are: *High*, *Low*, and *Medium*.

### Product

Select the product to which the fix applies.

### Verified By

Select the name of the person who verified that the fix was successful.

<b>Production ID</b>	Select the appropriate production ID for your product selection. Only IDs linked to the selected product appear through this search.
<b>Version</b>	Once you select a production ID, the system automatically displays the version label.
<b>Component ID</b>	Select the component for which the fix applies.
<b>Verified On</b>	Select the date of the verification.
<b>First Found In</b>	Select the product version in which the defect was first reported.
<b>Fixed In</b>	Select the product version in which the fix was first successfully applied.
<b>Verified In</b>	Select the product version in which the fix was first successfully tested.

---

**Note:** Several of the fields on this page enable you to distinguish between product versions. For example, a flaw in a piece of software code might be introduced into a program in one version (the Production ID field) but not discovered until a later version (the First Found In field). That same flaw might not be fixed until an even later version (the Fixed In field) is issued. By noting the program version in which the problem was introduced, you know to provide the fix to customers who are still using earlier versions.

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## Quality Management - Defects Page

Use the Quality Management - Defects page (RQ\_FIX\_DEFECT\_LNKS) to link defects with fixes.

You can link multiple defects to a single fix.

### Navigation

Quality Management, Add Fix, Defects

Quality Management, Search Fixes, Defects

### Image: Quality Management - Defects page

This example illustrates the fields and controls on the Quality Management - Defects page.

The screenshot shows the 'Quality Management' interface. At the top, there is a header bar with buttons: 'Save', 'Refresh', 'Add Fix', 'Notification', 'Clone', 'Search', and 'Personalize'. Below this, a form displays 'Fix ID' as 'FIX000000300001' and 'Subject' as 'The power supply in an affecte...'. Below the form, there are tabs for 'Fix', 'Defects', and 'Notes'. The 'Defects' tab is selected, showing a table titled 'Defects Linked To This Fix'. The table has columns 'Defect ID' and 'Subject'. One defect is listed with 'Defect ID' 'DEF000000300001' and 'Subject' 'The power supply in an affected 8200 Series Router may short out if the unit is turned on its side during operation.' Below the table, there are buttons for 'Add a Link to Defect' and 'Search Defects'.



As fixes are implemented, use the Defects page to link the fix to one or more defects. This provides an immediate link to all reported defects resolved in full or in part by the fix. Alternately, you can link the fix to the defect using the Fixes page in the Defects component.

PeopleSoft Search is used to perform search on defects. Refer to "Understanding PeopleSoft Search Framework Definitions for CRM (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)" and "Understanding PeopleSoft Search Framework Definitions for CRM (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)" topics for more information on using PeopleSoft Search in CRM.

<b>Subject</b>	Displays the subject of the selected defect.
<b>Add a Link to Defect</b>	Click to add a new row to the Defects Linked To This Fix grid.

## Quality Management - Notes Page

Use the Quality Management - Notes page (RQ\_FIX\_NOTE) to add notes and attachments to a fix, forward notes to other parties on an ad hoc basis, and generate ad hoc email messages.

### Navigation

Quality Management, Add Fix, Notes

Quality Management, Search Fixes, Notes

The process of adding notes and attachments is similar across all PeopleSoft applications.

For instructions on adding notes and attachments, see "Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)".



# Configuring Self-Service Applications

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## Understanding PeopleSoft Call Center's 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 self-service configurability options are display templates. When associated with the Case component, display templates control the appearance and behavior of self-service components and their pages. Implementers can show or hide pages, sections and fields, as well as adjust field labels.

---

**Note:** If you create a new display template for self-service transactions, you must define the new template for all the self-service components.

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See [Setting Up Basic Prompt Tables for Cases](#).

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

See [Understanding Call Center Business Units](#)[Understanding Display Templates](#).

### RC\_SUPPORT Display Template

The RC\_SUPPORT, CRM\_COM, CRM\_ENG, CRM\_FIN, CRM\_INS and CRM\_GOV display template controls these PeopleSoft Support self-service application components:

- RC\_CASE\_SW\_SS (Support - Manage Case)
- RC\_CASE\_SW\_SS\_RPT ( Support - Create Case)
- RC\_CASE\_SW\_SS\_SRCH (Support - Search Cases)
- RC\_SOLNSRCH\_SW\_SS ( Support - Search Solutions)

- RC\_SS\_SW (Self Service Support Desk)

## **RC\_HELPDESK, CRM\_HHD, and CRM\_HE Display Templates**

The RC\_HELPDESK (PeopleSoft HelpDesk), CRM\_HHD (PeopleSoft HelpDesk for Human Resources), and CRM\_HE (PeopleSoft Service Center for Higher Education) display templates controls the following HelpDesk self-service application components:

- RC\_CASE\_HD\_SS ( HelpDesk - Manage Case)
- RC\_CASE\_HD\_SS\_RPT ( HelpDesk - Create Case)
- RC\_CASE\_HD\_SS\_SRCH (HelpDesk - Search Cases)
- RC\_SOLNSRCH\_HD\_SS ( HelpDesk - Search Solutions)
- RC\_SS\_HD (Self Service HelpDesk Desk)

## **Contact Me Notifications**

If you include the Contact Me Regarding This Problem button on the self-service application pages, ensure that clicking this button sends the appropriate notifications. PeopleSoft delivers AAF objects (trigger points, action types, and terms) to support this process.

The delivered AAF objects send notifications to the assignee (agent, provider group, or call center manager). Separate email and worklist notifications enable the system to send notifications using the recipient's preferred notification method.

### **Related Links**

"Understanding Business Units in PeopleSoft CRM (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## **Live Chat**

All self-service pages are enabled for chat. This immediate access to a live agent, if needed, encourages self-service adoption and enables organizations to eliminate potential customer frustration or abandonment by delivering real-time service.

See "Understanding Chat (*PeopleSoft CRM 9.2: Multichannel Applications*)".

## **Association of Solutions with Case Closure Reasons**

Depending on system configuration, closed cases are generally associated with a successful solution. You define whether a self-service application user can close or reopen self-service application cases on the Business Unit - Options page.

When a self-service application user clicks the Close Case button to close a case, the Close Case page prompts the user for a reason. The system derives the successful solution from the reason that the self-service application user enters. Reason codes are tied to solutions which are then used to resolve the case.

There are two types of case closure reasons:

- A predefined reason (as established on the Reason Code page).

- A free-form text reason.

---

**Note:** Use the Reason and Solution Link page to associate solutions with each of the predefined reasons. If the user selects a reason that does not have an associated solution, the system creates and uses a new solution type: *Canned*. The reason code description becomes the solution summary. If the user enters a free-form text reason, the system creates and uses a new solution type: *Adhoc*. The text that the user enters becomes the solution summary. Users can enter multiple solutions to solve cases.

---

## Related Links

[Understanding Processing a Case](#)

[Associating Solutions with Reasons for Closing Cases](#)

[Understanding Call Center Prompt Tables](#)

"Understanding Solution Management Setup (*PeopleSoft CRM 9.2: Services Foundation*)"

"Understanding Solutions (*PeopleSoft CRM 9.2: Services Foundation*)"

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

## Search Descriptions for Predefined Searches

Self-service application users have access to predefined searches that locate cases that are associated with the user.

### Case Accessibility

Self-service application cases can be accessed by:

- Company representatives (contacts).

In PeopleSoft Support cases are created mainly for companies. This is anyone who acts as a contact for the company, regardless of whether that person is associated with the case in question. You can also allow the creation of cases for consumers. When cases are created for consumers, the contact can be a consumer or another person.

Note that in PeopleSoft Service Center for Higher Education, cases can be created by constituents (who have the role of individual consumers).

- Employees.

In PeopleSoft HelpDesk and PeopleSoft HelpDesk for Human Resources cases are typically created by employees. In PeopleSoft HelpDesk there can be an alternate contact. Employees acting on their own behalf are *not* considered alternate contacts.

In PeopleSoft Service Center for Higher Education, cases can be created by employees: this is typically done by staff or faculty who need to create a case.

- Managers

In PeopleSoft HelpDesk for Human Resources managers can report cases on behalf of the people reporting directly to them. This functionality requires an interface to a human resource management system. In PeopleSoft HelpDesk managers can report a case on behalf of another worker, provided the worker has been properly entered into the PeopleSoft CRM system.

A person who is a contact for more than one customer (for example, a consultant who works with several of your customers) uses the Customer Selection pagelet in the PeopleSoft Customer Portal to indicate which company's information to access.

## Case Searching

Self-service application users can search for existing cases in two ways:

- Basic search.

The user selects a search from a list of predefined searches.

- Advanced search.

The user can enter search words, including field-specific search criteria.

There are two categories of predefined searches (searches in both categories search across business units).

- *All cases*: This search locates all of the cases that the user can access:
  - In PeopleSoft Support, company contacts can view all of the company's cases, including cases for which they are not the contact.
  - In PeopleSoft Support, consumers can view all of the cases that are reported on their behalf (regardless of the contact) and all of the cases for which they are contacts (regardless of the customer).
  - In PeopleSoft HelpDesk, employees can view all of the cases that were reported on their behalf (regardless of the contact) and all of the cases for which they are alternate contacts, even if the case was reported for someone else. The delivered name for this search is *all my cases*.
  - In PeopleSoft Service Center for Higher Education, consumers, company contacts and employees will be able to view their cases and any cases for which they are a contact.
- *Cases for which I am the contact*: This search locates cases where the self-service application user is the contact, regardless of the person or company for whom the case was created.
  - In PeopleSoft Support, a person representing a company can view cases for the company that is being represented. They do, however, have to be the contact for the case to be able to view the case.
  - In PeopleSoft Support, consumers can view cases for which they are the contact. Unless another person is identified as the case contact, consumers are considered their own contacts.
  - In PeopleSoft HelpDesk, employees can view cases for which they are the alternate contact. This search does not retrieve cases for which the user is the employee and there is no alternate contact, even though the absence of an alternate employee implies that the employee is the case contact.

These predefined searches are based on the *All cases* and *Cases for which I am the contact*.search types:

- All cases that I am contact for.
- All my cases.
- All my open cases.

- Cases that I am contact for, last 30 days.
- Cases that I am contact for, last 7 days.
- Cases that I reported for others.
- My cases reported in the last 30 days.
- My cases reported in the last 7 days.
- Open cases that I am contact for.
- Open cases that I reported for others.

When you configure descriptions for the searches, you can set up different descriptions for each delivered role type: *contact*, *consumer*, *broker*, and *employee*.

---

**Note:** If you add additional role types that apply to self-service application users, you must set up corresponding predefined searches. The system does not do this for you.

---

### Related Links

"Defining Role Types and Role Categories (*PeopleSoft CRM 9.2: Business Object Management*)"

## Troubleshooting Guide and FAQ Configuration

PeopleSoft Support and HelpDesk self-service application users have direct access to solutions and troubleshooting guides.

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**Note:** Troubleshooting guides and FAQs are used in PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources.

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### Troubleshooting Guides

To make a troubleshooting guide script available to self-service application users, associate it with a solution library. You can associate solution libraries with one script only, so you must create a library for each script. When self-service application users select a script, they see the library name, not the script name.

### Frequently Asked Questions (FAQs)

The Frequently Asked Questions self-service page gives PeopleSoft Support self-service customers access to solutions whose corresponding library has the External FAQ check box selected.

### Related Links

[Accessing FAQs](#)

"Defining Role Types and Role Categories (*PeopleSoft CRM 9.2: Business Object Management*)"

[Selecting and Running Troubleshooting Guides](#)

"Understanding Solution Management Setup (*PeopleSoft CRM 9.2: Services Foundation*)"

"Understanding Solutions (*PeopleSoft CRM 9.2: Services Foundation*)"

## 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. Create a new email template (if you do not want to use the delivered email template for your email notifications).
2. Set up an AAF policy to configure the use of the Contact Me Regarding This Problem button.

Use these AAF delivered data elements:

<b>Data Element</b>	<b>Name</b>
Trigger Point	After a New Self-Service HelpDesk Case is Saved After a New Self-Service Support Case is Saved
Policy Name	Employee Has Requested Contact - Agent Assigned Employee Has Requested Contact - Provider Group Assigned Employee Has Requested Contact - No Provider Group or Agent Assigned Self Service Case Created - Assigned to Agent Self Service Case Created - Assigned To Provider Group <b>Note:</b> These are the policies that PeopleSoft delivers. You can create new policies as you need them.
Action Type	Notifications & Workflow
Action Name	Worklist Notification to Assigned To Send Worklist Notification

### Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

"Sending Contact Us Messages (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"



## 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	Definition 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 users can select from to close cases through self-service applications.

### Reason and Solution Link Page

Use the Reason and Solution Link page (RC\_REASON\_SOLN) to identify the solutions that users can select from to close cases through self-service applications.

#### Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Reason and Solution Link

#### Image: Reason and Solution Link page

This example illustrates the fields and controls on the Reason and Solution Link page.

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 Code

Displays all the 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 from when closing a case.

#### Solution ID

Select the solution that represents the reason a user may close a case. When a self-service application user closes a case and selects a reason, the associated solution is added to the case as a resolution with this status: *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

To update search descriptions, use the Predefined Search Attributes (RG\_DEFINED\_SRCH) component.

This section discusses how to update predefined search descriptions.

### Page Used to Update Search Descriptions

Page Name	Definition 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.

### Predefined Search Attributes Page

Use the Predefined Search Attributes page (RC\_DEFINED\_SRCH) to update predefined search descriptions.

#### Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Predefined Search Attributes

#### Image: Predefined Search Attributes page

This example illustrates the fields and controls on the Predefined Search Attributes page.

Predefined Search Attributes				
Pre-defined Search ID: AGENT				
*Description: Agent - My Cases Pagelet				
Search Attributes				
Enabled	Default	Search Code	Role Type	Description
<input checked="" type="checkbox"/>	<input type="checkbox"/>	COL30	Worker	All my cases modified in last 30 days
<input checked="" type="checkbox"/>	<input type="checkbox"/>	COL7D	Worker	All my cases modified in last 7 days
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	COOPN	Worker	All my open cases
<input checked="" type="checkbox"/>	<input type="checkbox"/>	UNAGN	Worker	Unassigned cases in my provider group

For each search code and customer role type combination, review the search description and modify it as needed. You can also enable a search code or disable it by either clearing or selecting the associated check box. Select one of the search codes as the default, if desired.

## Configuring Troubleshooting Guide

To configure troubleshooting guides, use the Troubleshooting Guide (RBT\_TGUIDE\_SETUP) and Solution Library Setup (RC\_SOLN\_LIB\_SETUP) components.

This section discusses how to:

- Configure a troubleshooting guide solution library.
- Configure an FAQ solution library.

### Pages Used to Configure Troubleshooting Guides

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
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.
Libraries	RC_SOLN_LIBRARY	Solutions, Search Solutions, Libraries	Create solution libraries.

### Troubleshooting Guide Page

Use the Troubleshooting Guide page (RBT\_TGUIDE\_SETUP) to identify troubleshooting guide scripts that customers can access through self-service applications.

#### Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Troubleshooting Guide Setup, Troubleshooting Guide

#### Image: Troubleshooting Guide page

This example illustrates the fields and controls on the Troubleshooting Guide page.

### Troubleshooting Guide

SetID IPROD

Solution Library CAPP

Library Name Commercial Appliances

\*Script ID 11000027

Script Name Commercial Appliance Troubleshooting-SS

Description

Modified 10/18/2002 9:37AM PDT

SAMPLE

\* Required Field

**Script ID**

Select the script to run when the self-service application user selects the solution library.

Because each library is associated with a single script, you must create additional libraries for each script that you want to make available to self-service application users on the Customer Care - Troubleshooting Guide page.

**Libraries Page**

Use the Libraries page (RC\_SOLN\_LIBRARY) to create solution libraries.

**Navigation**

Solutions, Search Solutions, Libraries

**Image: Solution Library page**

This example illustrates the fields and controls on the Solution Library page.

*Library	Library Name	Internal FAQ	External FAQ
CPHW	Computer Hardware	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select the External FAQ check box to make the solution available to self-service users as a Frequently Asked Question.

Solution libraries are set up in a similar manner across many PeopleSoft CRM applications.

**Related Links**

"Solution Library Page (*PeopleSoft CRM 9.2: Services Foundation*)"

# Working with Self-Service Application Transactions

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## Understanding Self-Service Transactions

PeopleSoft CRM call center applications enable you to deploy self-service transactions that callers can use to enter and view their own cases. These transactions provide limited access to case information and employ a simple interface that is suited to the casual, untrained user.

This topic discusses:

- Self-service transactions.
- Configurable functionality.
- Self-service data access.
- Case visibility.
- Confirmation pages.

### Related Links

"Understanding Customer Self-Service (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Self-Service Transactions

The following transactions are available to PeopleSoft Support, PeopleSoft HelpDesk, PeopleSoft HelpDesk for Human Resources, and PeopleSoft HelpDesk for Higher Education self-service users:

- Search for solutions outside the context of a case.
- Create a new case (Create Case).
- Manage cases.

Search for, review, and update existing cases.

- Use FAQs.

Access solutions that belong to the solution library with a specific FAQ configuration.

- Use troubleshooting guides.

Access and run troubleshooting guide scripts that have been associated with solution libraries.

---

**Note:** For information on using employee self service to add and manage change requests, refer to the documentation on Using Change Management.

---

## Related Links

[Managing Basic Change Request Information](#)

## Configurable Functionality

Within the transactions that are used to create and manage cases, certain functionality depends on the system configuration.

### Business Unit Configuration

The availability of the following functionality depends on the settings on the Business Unit - Options page:

- Close a case.

The Close this case link is available for cases that have not been resolved and have no corresponding resolution with the status *Successful Resolution*. The button's availability depends not on the case status, but on the resolution status.

When a self-service user clicks this button and provides a reason for closing the case, the system adds a successful resolution to the case and updates the status based on the closed case status that you select on the Case Defaults page. (If you do not enter a closed case status or if you enter a status with a type other than *Closed*, then the case is not closed. It is resolved, however.)

- Reopen a case.

The Re-open this case link is available for cases that have been resolved—that is, there is a resolution with the status *Successful Resolution*. The button's availability depends not on the case status, but on the resolution status.

When a self-service user clicks the Re-open this case button and provides a reason for reopening the case, the system changes the status of the successful resolution to *Resolution Failed* and updates the status based on the reopened case status that you select on the Case Defaults page. (If you do not enter a reopened case status, the status does not change.)

If your organization has not set a reopened case status, the status doesn't change. This could result in cases having a closed status without having a successful resolution—a condition that the system normally does not allow.

Users can reopen cases only during the grace period that is established by your organization. The grace period lasts for a specified number of days after a user has resolved the case.

### Active Analytics Framework (AAF) Notifications

The AAF decision engine handles notifications related to activity that is in the self-service pages. PeopleSoft delivers AAF action types that:

- Send a notification when a new case is submitted.

- Send a notification when a user clicks the Contact Me regarding this case button.

The system sends both notifications to the agent, call center manager, or provider group who is assigned to the new case.

---

**Note:** All AAF policies are delivered inactive. Users must activate the AAF objects that they wish to use.

---

## Self-Service Workflow

PeopleSoft has built these action types and workflow actions into its self-service applications for PeopleSoft HelpDesk, HR HelpDesk, Support, and Service Center for Higher Education:

- When a self-service user saves any change to the case, the system sends an email notification to the person to whom a case is assigned.
- When a self-service user creates a new case, the system sends a worklist notification to the default self-service provider group that is associated with the business unit.
- When a user clicks the Contact Me Regarding This Problem button for a case that is assigned to an agent:
  - The system sends an email to the assigned agent of the case if their notification preference is email or both.
  - The system sends the case to the assigned case agent's list if their notification preference is worklist or both.
- When a user clicks the Contact Me Regarding This Problem button for a case that is assigned to a provider group (but not to an agent), the system sends a worklist entry to the provider group members.
- When a user clicks the Contact Me Regarding This Problem button for a case that is unassigned, the system sends a worklist entry to members of the Contact Me provider group (established on the Case Defaults page).

## Field Value Configuration

When you set up prompt tables for certain case fields, you can enter self-service versions of the field values.

## Related Links

[Understanding Self-Service Transactions](#)

[Understanding Call Center Business Units](#)

[Understanding Display Templates](#)

[Understanding Call Center Prompt Tables](#)

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Self-Service Data Access

The fields and data that appear in the self-service transactions vary depending on the configuration and on the data itself.

## Field Visibility

Implementers can control the visibility of fields and the appearance of field labels by modifying the display template.

See [Understanding Self-Service Transactions](#).

## Row-Level Visibility

Individual case notes and case history items have a visibility attribute that controls self-service access to the data. The Case Notes and Case History grids on the Manage Case page show only rows of data with *All* visibility. Notes, attachments, and history items with internal visibility do not appear.

Access to solutions is more complex, depending on two factors:

- Solution visibility

When accessing solutions using Solution Advisor or the Frequently Asked Questions page, only solutions with *All* visibility are visible.

- Resolution status

When viewing a case, self-service users can see associated solutions that have a status other than *Withdrawn*. Solutions that are associated with a case appear regardless of the solution's visibility setting.

- Case visibility

When searching cases in Case Search, only the cases with *All* visibility are visible.

## Values That Are Available for Selection

When creating a case, self-service users have access to all fields that are available for entry. For some prompt fields (case type, priority, severity, category, specialty type, and detail), self-service users might not have access to all of the values that are valid for agents. This restriction is based on how the value was defined on its setup page. Only values that are tagged for self-service use are available. Furthermore, the field labels for self-service users may differ from those seen by agents (depending on prompt table setup).

## Related Links

[Understanding Self-Service Transactions](#)

[Understanding Call Center Prompt Tables](#)

"Understanding Notes and Attachments (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Case Visibility

To prevent employees from viewing sensitive case information (for example, grievances) through the HelpDesk self-service applications, PeopleSoft has added a value called *Internal, exclude Case Contact* to the Visibility drop-down menu list on the agent-facing Case page. When an agent selects *Internal, exclude Case Contact*, the employee who is the subject of the case is unable to view the case through the HelpDesk self-service application.



The person who reported the case (Reported By) can view it in the self service application if the case is not secured. When a case is secured, the Reported By person will no longer have visibility to the case in the self-service application.

---

**Note:** This feature is only applicable to CRM HelpDesk, HelpDesk for Human Resources, and Service Center for Higher Education.

---

## Related Links

[Case Visibility](#)

## Confirmation Pages

When self-service users perform certain actions, the system provides a confirmation to assure the user that the transaction was successful.

The confirmation pages have different forms depending on the application.

- PeopleSoft Support displays confirmation text at the top of the page where the user performs the action. The confirmation message is highlighted with a yellow background.
- PeopleSoft HelpDesk and PeopleSoft Service Center for Higher Education use a separate confirmation page, where the user must click a button or link before continuing.

---

**Note:** You can control the appearance of configuration pages by modifying display templates.

---

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

The following actions trigger confirmation messages:

<b>User Action</b>	<b>PeopleSoft HelpDesk Confirmation Page</b>	<b>Description</b>
Submit a new case without searching for solutions (click the Submit button, not the Submit and Search Solutions button).	Submit Confirmation page (RC_CASE_HD_SS_CONF)	Confirms that the user submitted the case. Gives the user the new case number.
Close a case.	Submit Confirmation page (RC_CASE_HD_SS_CLOS)	Confirms that the case is successfully closed.
Reopen a case.	Submit Confirmation page (RC_CASE_HD_SS_SUBT)	Confirms that the case is successfully reopened.
Answer <i>Yes</i> when asked whether a solution resolved the user's problem (when viewing a solution in the context of a case).	Close Case page (RC_CASE_HD_SS_CLOS)	Confirms that the solution is successful and the case is closed.

## Understanding the Self-Service Home Page Content and Layout

The self-service home page is a central place where all self-service actions such as finding information, creating cases, and chatting with an agent can be initiated and shortcuts to HR transactions are available. Users can access information or resources they need in order to get their issues resolved. PeopleSoft CRM delivers four versions of home pages:

- HR Service Center: HR Help Desk for employees to manage HR questions and inquiries.
- IT Service Center: IT Help Desk for employees to manage IT questions and inquiries.
- Customer Service Center: Support for customers.
- Campus Service Center: Higher Education for students and faculty.

Various controls and information are displayed on the home page in the form of pagelets. The home pages have different combinations of the following pagelets:



- Welcome Banner
- Quick Links
- Search Here for Answers
- Top Solutions
- FAQ
- Known Issues
- Discussion Forums
- My Recent Cases
- Shortcuts

The Welcome Banner and Search Here for Answers pagelet are fixed in their positions. The self-service user can move other pagelets around by dragging and dropping them to a new position. The following table lists the different pagelets and their description, properties, and the home page they appear in.

<b><i>Pagelet</i></b>	<b><i>Home Page in Which the Pagelet Appears</i></b>	<b><i>Description</i></b>
Welcome Banner	All	Greets the logged in self-service user.
Quick Links	All	Displays links for users to navigate to other components such as Create Case, Manage Cases, Chat, and Email.
Search	All	Allows the user to search for content using the keyword search or browsing through content.
Top Solutions	All	Displays a pre-defined list of top solutions.

<b>Pagelet</b>	<b>Home Page in Which the Pagelet Appears</b>	<b>Description</b>
FAQ	Customer Service Center, HR Service Center, and IT Service Center	Displays a pre-defined list of Frequently Asked Questions.
Known Issues	All	Displays a pre-defined list of Global Cases.
Discussion Forums	Campus Service Center	Displays a list of discussion forums from Enterprise Portal.
My Recent Cases	All	Displays a list of recent cases for the logged in user.
Shortcuts	HR Service Center and Campus Service Center	Displays a list of shortcuts to HCM, EBS, or Campus Solutions that have been defined by the Administrator.

All pagelets except the Welcome Banner has icons in the top-right corner. The following table describes the icons on the pagelets.

<b>Icons</b>	<b>Description</b>
	Refreshes the contents of the pagelet
	Displays options to minimize or expand and remove pagelet.

## Accessing Self-Service Transactions In PeopleSoft CRM and HCM

This topic provides overviews on self-service case search, case creation, and case management as they relate to display template families, and discusses how to access self-service transactions.

### Understanding Self-Service Case Search and Display Template Families

The system passes the display template family from the content reference (CREF). This enables the system to search for cases across the display template family for cases using the self-service search case component (RC\_CASE\_SW\_SS\_SRCH or RC\_CASE\_HD\_SS\_SRCH).

<b>CREF Name</b>	<b>Vertical</b>	<b>Display Template Family</b>
CR_RC_CASE_SW_SS_SRCH_GBL	Support	RC_SUPPORT
CR_RC_CASE_HD_SS_SRCH	IT Help Desk	RC_HELPDESK
CR_RC_CASE_HD_SS_SRCH_HHD	HR Help Desk	CRM_HHD
CR_RC_CASE_HD_SS_SRCH_HE	Service Center for Higher Education	CRM_HE

The searching logic uses the display template family instead of the display template ID to filter the cases that are shown in the results grid. Based on the defaulting logic described in previous topics on display template families, the system defaults the display template family, business unit, and display template ID in the self-service search results grid which is displayed when the user searches for a case using the Find Cases link on the Quick Links pagelet. You cannot, however, define AAF actions for this component. For the Create Case and Manage Case components you can, however, use AAF to render the Case page with a selected display template.

## Case Creation and Display Template Families

The system passes the display template family from the content reference (CREF) to create cases for the create case component (RC\_CASE\_SS).

The system renders the Create Case pages for the different verticals based on the defaulting logic described in previous topics, which relies on system defaults for the display template family, business unit and display template ID.

PeopleSoft delivers four AAF trigger points that you can use to render the Create Case page using different display template IDs:

- When a New IT Service Center Case is presented.
- When a New HR Service Center Case is presented
- When a New IT Service Center Case Business Unit is changed.
- When a New IT Service Center Case Business Unit is changed.

Based on the AAF policies that you create, the system derives the display template ID when the Case Post Build Event executes. This is used to render the Create Case page. With this design, the system does not store the display template ID in the case record. Instead, the system stores the display template family code in the case record.

## Case Management and Display Template Families

The system passes the display template Family from the *CRMRefTransfer* application programming interface (API) to display the Manage Case page (RC\_CASE\_SW\_SS).

The system renders the Manage Case pages for the different verticals based on the defaulting logic described in previous topics, which relies on system defaults for the display template family, business unit and display template ID.

PeopleSoft delivers two AAF trigger points for this component that you can use to render the Case <ID> page using different display template IDs:

- When a IT Service Center Manage Case is presented.
- When a HR Service Center Desk Manage Case is presented.

After the system creates a case, you cannot change the display template family code.

## Pages Used to Access Self-Service Transactions

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Customer Service Center	(not applicable)	<ul style="list-style-type: none"> <li>Customer Service Center</li> <li>Customer Care, Customer Service Center</li> </ul>	Select a PeopleSoft (Support) self-service application transaction.
IT Service Center	(not applicable)	<ul style="list-style-type: none"> <li>IT Service Center</li> <li>Employee Self Service, Help Desk, IT Service Center</li> </ul>	Select a PeopleSoft Help Desk self-service application transaction.
HR Service Center	(not applicable)	<ul style="list-style-type: none"> <li>HR Service Center</li> <li>Employee Self Service, HR Help Desk, HR Service Center</li> </ul>	Select a PeopleSoft HR Help Desk self-service application transaction.
HCM Employee Self-Service	(not applicable)	<ul style="list-style-type: none"> <li>Click the HCM Employee Self-Service link in the Quick Links section on the HR Service Center home page.</li> <li>Employee Self Service, HR Help Desk, HCM Employee Self-Service</li> </ul>	Select an employee self-service application transaction in PeopleSoft HCM.
HCM Manager Self-Service	(not applicable)	<ul style="list-style-type: none"> <li>Click the HCM Manager Self-Service link in the Quick Links section on the HR Service Center home page.</li> <li>Employee Self Service, HR Help Desk, HCM Manager Self-Service</li> </ul>	Select a manager self-service application transaction in PeopleSoft HCM.
Campus Service Center	(not applicable)	<ul style="list-style-type: none"> <li>Campus Service Center</li> <li>Service Center, Campus Service Center</li> </ul>	Select a PeopleSoft Service Center for Higher Education self-service application transaction.
Student Center	(not applicable)	<ul style="list-style-type: none"> <li>Click the Student Center link in the Campus Shortcuts section on the Campus Service Center home page.</li> <li>Service Center, Student Center</li> </ul>	Select a self-service application transaction in PeopleSoft Student Center ( Campus Service Center).
Faculty Center	(not applicable)	Click the Faculty Center link in the Campus Shortcuts section on the Campus Service Center home page.	Select a self-service application transaction in PeopleSoft Faculty Center ( Campus Service Center).

Page Name	Definition Name	Navigation	Usage
Customer Selection	CUST_SELECT	<ul style="list-style-type: none"> <li>Customer Selection</li> <li>Service Center, Customer Selection</li> </ul>	Select a customer to represent in PeopleSoft Customer Service Center or Campus Service Center self-service application transactions.

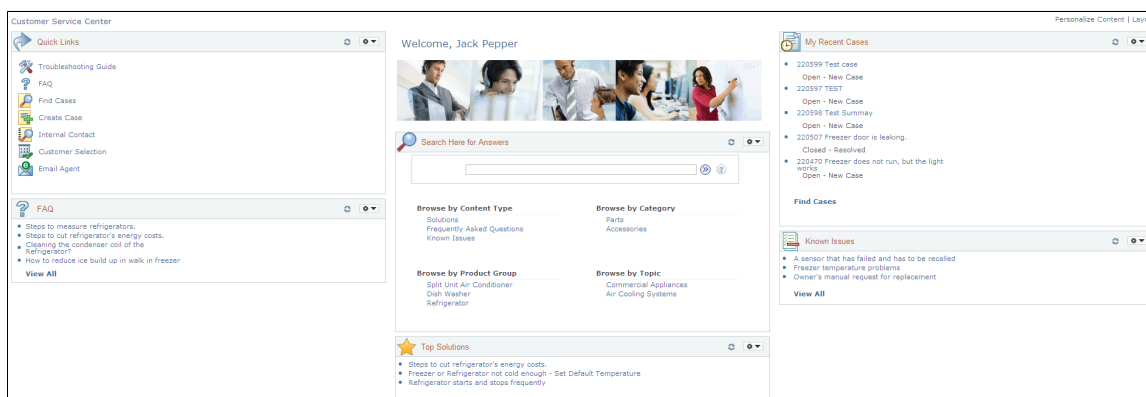
## Customer Service Center Home Page

Use the Customer Service Center home page to select a PeopleSoft Support self-service application transaction.

- Customer Service Center
- Customer Care, Customer Service Center

### Image: Customer Service Center home page

This example illustrates the fields and controls on the Customer Service Center home page.



## IT Service Center Home Page

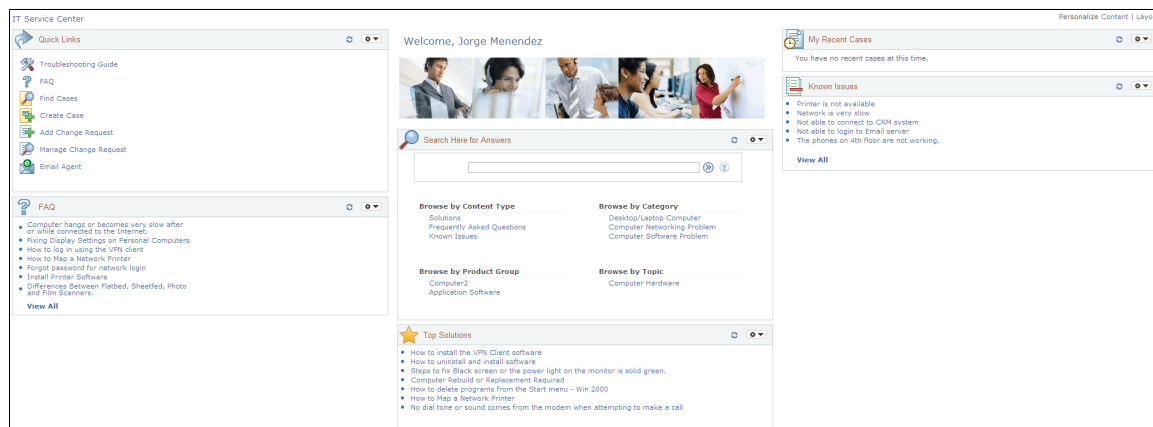
### Navigation

Use the IT Service Center home page to select a PeopleSoft Help Desk self-service application transaction.

- IT Service Center
- Employee Self Service, Help Desk, IT Service Center

### Image: IT Service Center home page

This example illustrates the fields and controls on the IT Service Center home page.



## HR Service Center Home Page

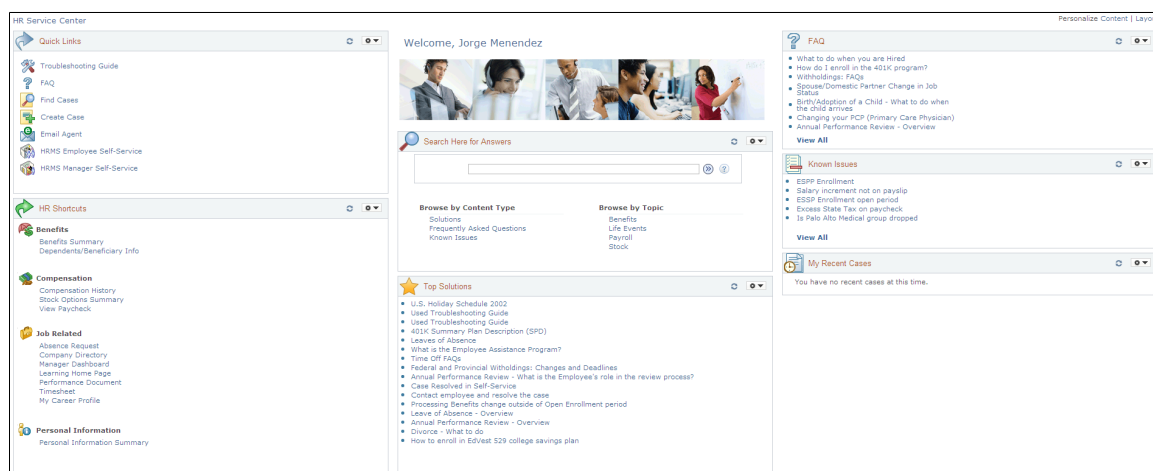
### Navigation

Use the HR Service Center home page to select a PeopleSoft HR Help Desk self-service application transaction.

- HR Service Center
- Employee Self Service, HR Help Desk, HR Service Center

### Image: HR Service Center home page

This example illustrates the fields and controls on the HR Service Center home page.



## HCM Employee Self Service Home Page

Use the HCM Employee Self Service Home Page to select an employee self-service application transaction in PeopleSoft HCM.

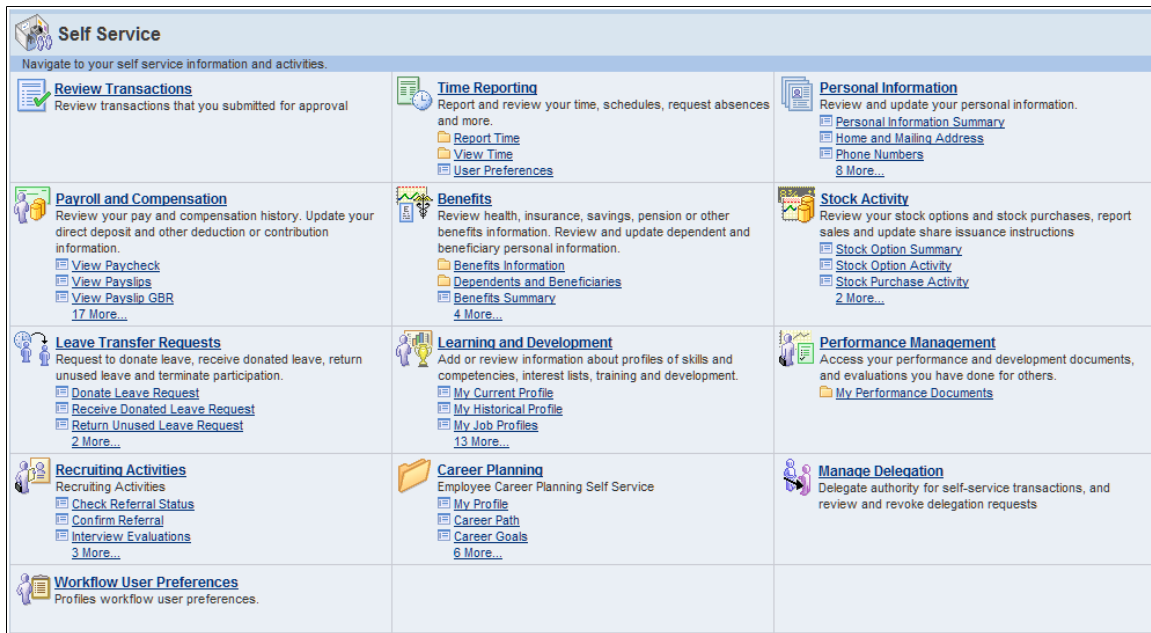


## Navigation

- Click the HCM Manager Self-Service link in the Quick Links section on the HR Service Center home page.
- Employee Self Service, HR Help Desk, HCM Manager Self-Service

### Image: HCM Employee Self-Service home page (PeopleSoft HCM)

This example illustrates the fields and controls on the HCM Employee Self-Service Home page (PeopleSoft HCM).



## HCM Manager Self-Service Home Page

Use the HCM Manager Self-Service home page to select a manager self-service application transaction in PeopleSoft HCM.

## Navigation

- Click the HCM Employee Self-Service link in the Quick Links section on the HR Service Center home page.
- Employee Self Service, HR Help Desk, HCM Employee Self-Service

### Image: Manager Self-Service home page(PeopleSoft HCM)

This example illustrates the fields and controls on the Manager Self-Service home page (PeopleSoft HCM).



Click the links on these pages to access self-service transactions in PeopleSoft HCM.

**Note:** PeopleSoft delivers URL identifiers for both the Manager Self-Service page and the Employee Self-Service page in PeopleSoft HCM. To provide access to these pages from PeopleSoft CRM you must update the URLs with the correct server names for your PeopleSoft HCM application. Go to PeopleTools, Utilities, Administration, URLs, URL Maintenance. Then select the RC\_HD\_HRHOME URL identifier and enter the correct URL for the page. Repeat the same process for the RC\_HD\_HRHOME\_MGR URL identifier.

See *PeopleTools: System and Server Administration*.

## Campus Service Center Home Page

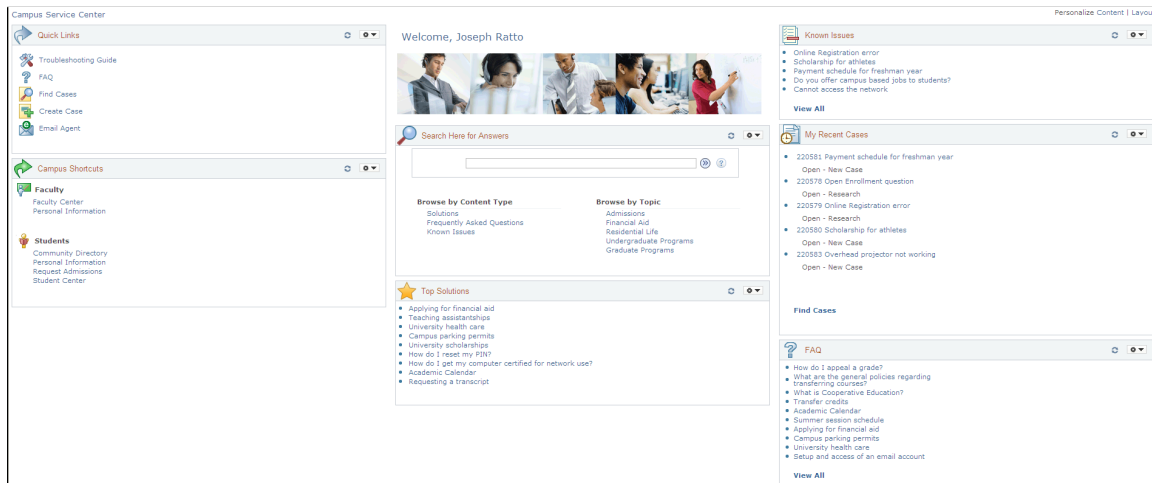
Use the Campus Service Center home page to select a PeopleSoft Service Center for Higher Education self-service application transaction.

## Navigation

- Campus Service Center
- Service Center, Campus Service Center

### Image: Campus Service Center home page

This example illustrates the fields and controls on the Campus Service Center home page.



## Student Center Home Page

### Navigation

- Click the Student Center link in the Campus Shortcuts section on the Campus Service Center home page.
- Service Center, Student Center

### Image: Student Center page (1 of 2) [PeopleSoft Campus Solutions]

This example illustrates the fields and controls on the Student Center page (1 of 2) [PeopleSoft Campus Solutions].

Melissa Richards
ID: ADCRM1002

[student center](#)
[general info](#)
[admissions](#)
[transfer credit](#)
[academics](#)
[finances](#)
[financial aid](#)

### Melissa's Student Center

Academics

[My Class Schedule](#)  
[Shopping Cart](#)  
[My Planner](#)

other academic...

Deadlines
URL
Gradebook

2009 Fall Schedule		
	Class	Schedule
	MUSIC 160-1 LEC (1028)	MoWeFr 8:30AM - 9:20AM Room: TBA
	PHILO 210-1 LEC (1026)	TuTh 9:00AM - 10:20AM Room: TBA
	SOC 100-1 LEC (1022)	MoWeFr 10:00AM - 10:50AM Room: TBA
	SOC 103-1 LEC (1032)	TuTh 2:00PM - 3:20PM Room: TBA

[weekly schedule](#)

SEARCH FOR CLASSES

Holds

Do Not Mail

[details](#)

To Do List

Financial Statement  
Transfer Statement

[details](#)

Enrollment Dates

[Open Enrollment Dates](#)

**Image: Student Center page (2 of 2) [PeopleSoft Campus Solutions]**

This example illustrates the fields and controls on the Student Center page (2 of 2) [PeopleSoft Campus Solutions].

<b>Finances</b> <b>My Account</b> <a href="#">Account Inquiry</a> <b>Financial Aid</b> <a href="#">View Financial Aid</a>		<b>Account Summary</b> <b>You owe 750.00.</b> ■ Due Now 500.00 ■ Future Due 250.00 <b>** You have a past due balance of 500.00. **</b> Currency used is US Dollar.		<b>Advisor</b> <b>Program Advisor</b> None Assigned						
<b>Personal Information</b> <a href="#">Demographic Data</a> <a href="#">Emergency Contact</a>		<b>Contact Information</b> <table border="1"> <tr> <td><b>Permanent Address</b> None</td> <td><b>Billing Address</b> None</td> </tr> <tr> <td><b>Primary Phone</b> None</td> <td><b>Home E-mail</b> HCMGENUser1@ap6023fems.us.oracle.com</td> </tr> </table>		<b>Permanent Address</b> None	<b>Billing Address</b> None	<b>Primary Phone</b> None	<b>Home E-mail</b> HCMGENUser1@ap6023fems.us.oracle.com	<b>News and Info</b> <a href="#">CNN</a> <a href="#">BBC</a> <a href="#">NBC</a>		
<b>Permanent Address</b> None	<b>Billing Address</b> None									
<b>Primary Phone</b> None	<b>Home E-mail</b> HCMGENUser1@ap6023fems.us.oracle.com									
<b>Admissions</b> <a href="#">Apply for Admission</a>		<table border="1"> <tr> <td>▲ Incomplete</td> <td>● Complete</td> <td>✓ Admitted</td> </tr> </table> <b>My Applications</b> <table border="1"> <tr> <td>PeopleSoft University</td> <td>Graduate Liberal Arts Programs</td> <td>2010 Fall</td> <td>●</td> </tr> </table>		▲ Incomplete	● Complete	✓ Admitted	PeopleSoft University	Graduate Liberal Arts Programs	2010 Fall	●
▲ Incomplete	● Complete	✓ Admitted								
PeopleSoft University	Graduate Liberal Arts Programs	2010 Fall	●							
		<b>Search Engines</b> <a href="#">Yahoo</a> <a href="#">Google</a>								
		<b>Other Links</b> <a href="#">Amazon</a>								

Click the links on this page to access self-service transactions in PeopleSoft Campus Solutions.

## Faculty Center Home Page

### Navigation

Click the Faculty Center link in the Campus Shortcuts section on the Campus Service Center home page.

### Image: Faculty Center home page (PeopleSoft Campus Solutions)

This example illustrates the fields and controls on the Faculty Center home page (PeopleSoft Campus Solutions).

**Sandy Kim**

[faculty center](#)
[class search](#)
[browse catalog](#)
[faculty search](#)
[learning management](#)

**Faculty Center**

[My Exam Schedule](#)  
[View My Advisees](#)  
[View Personal Data Summary](#)

**2000 Fall | PeopleSoft University**
[change term](#)

Select display option:
☒ Show All Classes
☐ Show Enrolled Classes Only

[Class Roster](#)
[Gradebook](#)
[Grade Roster](#)
[Learning Management](#)

**My Teaching Schedule > 2000 Fall > PeopleSoft University**

Class	Class Title	Enrolled	Days & Times	Room	Class Dates
<a href="#">ENGL110-1 (1116)</a>	Surv Brit Lit (Lecture)	14	MoWeFr 11:00AM - 11:50AM	Angel 103	Aug 27, 2000-Dec 15, 2000
<a href="#">ENGL1102-1 (1117)</a>	Surv Am Lit (Lecture)	37	MoWeFr 1:00PM - 1:50PM	Angel 102	Aug 27, 2000-Dec 15, 2000

[View Weekly Teaching Schedule](#)
[Go to top](#)

**My Exam Schedule > 2000 Fall > PeopleSoft University**

You have no final exams scheduled at this time.

[Go to top](#)

Faculty Center
[Class Search](#)
[Browse Catalog](#)
[Faculty Search](#)
[Learning Management](#)

## Customer Selection Page

Use the Customer Selection page (CUST\_SELECT) to select a customer to represent in PeopleSoft Customer Service Center and Campus Service Center self-service application transactions.

## Navigation

Service Center, Customer Selection

### Image: Customer Selection page

This example illustrates the fields and controls on the Customer Selection page.

**Customer Selection**

**You are currently representing MMA Property Management Group.**

---

Select the customer you want to represent.

**Customer List**

Cady Montgomery	Select
MMA Property Management Group	Current Selection

Use this page if you have more than one role in Customer Service Center or Campus Service Center. Click the Select button to choose the role that you wish to be used when accessing a Service Center for Higher Education self-service case.

If you have multiple roles and you do not access this page to select the desired role to be used for Customer Service Center or Campus Service Center self-service cases, the system will default your role by using the first role found for you in this hierarchy:

- Worker.
- Consumer (Constituent).
- Company Contact.

---

## Defining the Self-Service Home Page Content and Layout

These topics discuss how to:

- Identify the self-service pagelets to be displayed.
- Define the self-service home page layout.
- Personalize the self-service home page layout.

As an Administrator, you can perform the following for each pagelet:

- Position of each pagelet
- Whether the pagelet will be fixed or can be moved around by the end-user
- Whether the end-user can remove the pagelet
- Refresh and Page Setup icons

- Pagelet title

## Pages Used to Set Up the Self-Service Home Page

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Home Page - General	RC_SS_GENERAL	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, General	Enter an email address to which emails from the home page will be sent.
Home Page - Top Solutions	RC_SS_SOLUTION	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Top Solutions	Search for solutions using search criteria and select solutions to be displayed in the Top Solutions pagelet on the Support Self Service home page across different business units.
Home Page - Search Pagelet	RC_SS_FACET	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Search Pagelet	Set up the Search Here for Answers pagelet on the home page by selecting the facets and values under each facet to be displayed.
Home Page - FAQ	RC_SS_FAQ	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, FAQ	Select the top Frequently Asked Questions to be displayed in the FAQ pagelet on the home page across different Set Ids and Solution Libraries.
Home Page - Known Issues	RC_SS_ISSUES	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Known Issues	Select the Global Cases to be displayed to a self-service user.
Home Page - Shortcuts	RC_SS_LINKS	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Shortcuts	Set up HCM or Campus Solutions shortcut links to be displayed on the Home page.
Home Page - Quick Links	RC_SS_QUICK_LINKS	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Quick Links	Set up the quick links to be displayed in the Quick Links pagelet.
Home Page - Chat Schedule	RC_SS_AGT_SCHEDULE	Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Chat Schedule	Set up Chat Schedule based on agent availability.
Personalize Content: <Service Center Name>	PORTAL_HPCOMP	Click the Personalize Content link on the top-right corner of the Self-Service Service Center Home page.	Personalize the name of the home page, Welcome message, and select pagelets to be displayed.



<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Personalize Layout: <Service Center Name>	PORTAL_HPLAYOUT	Click the Personalize Layout link on the top-right corner of the Self-Service Service Center Home page.	Personalize the appearance and layout of the home page and delete pagelets.

## Home Page - General Page

Use the Home Page - General page (RC\_SS\_GENERAL) to enter an email address to which emails from the home page will be sent.

### Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, General

### Image: Home Page - General page

This example illustrates the fields and controls on the Home Page - General page.

### Email Address

Enter an email address in this field. The email address can be an ERMS mailbox or any other email address.

## Home Page - Top Solutions Page

Use the Home Page - Top Solutions page (RC\_SS\_SOLUTION) to search for solutions using search criteria and select solutions to be displayed in the Top Solutions pagelet on the Support Self Service home page across different business units.

## Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Top Solutions

### Image: Home Page - Top Solutions page (1 of 2)

This example illustrates the fields and controls on the Home Page - Top Solutions page (1 of 2).

**Solution to Display on Top Solutions Pagelet**

Order	SetID	Set ID Description	Solution Library	Solution ID	Solution Summary	Usage Count	Solved Count	Self Service Usage Count	Self Service Solved Count	Self Service Unsolved Count	Date Last Used
<input type="checkbox"/>	HRSQL	Solutions		301504	What is the Employee Stock Purchase Plan, or ESPP?						
<input type="checkbox"/>	HRSQL	Solutions		301507	How do I enroll in the 401K program?			1			
<input type="checkbox"/>	HRSQL	Solutions		301509	How long is a child considered a dependent for Health Benefits?						
<input type="checkbox"/>	HRSQL	Solutions		301514	Birth/Adoption of a Child - What to do when the child arrives			1			
<input type="checkbox"/>	HRSQL	Solutions		301523	On what day of the month do I receive my paycheck?						
<input type="checkbox"/>	HRSQL	Solutions		301538	Education Assistance Program			1			
<input type="checkbox"/>	HRSQL	Solutions		301563	Birth or Adoption of a Child - What to Do?						
<input type="checkbox"/>	HRSQL	Solutions		301574	New Hire Benefits enrollment Checklist						

Enter or select the criteria you want to appear in the list of Solutions and click Search.

**Search**

Use Saved Search

\*SetID  HRU01

Solution Library

Solution Summary contains

Usage Count

Solved Count

Self Service Usage Count

Self Service Solved Count

Self Service Unsolved Count

Last Usage  Time

Basic Search

### Image: Home Page - Top Solutions page (2 of 2)

This example illustrates the fields and controls on the Home Page - Top Solutions page (2 of 2).

**Search Results**

	SetID	Library Name	Solution ID	Solution Summary	Usage Count	Solved Count	Self Service Usage Count	Self Service Solved Count	Self Service Unsolved Count	Last Usage Date/Time
<input type="checkbox"/>	HRU01	Stock	300005	What is the Employee Stock Purchase Plan, or ESPP?						
<input type="checkbox"/>	HRU01	Stock	300020	Trading Window for Company Stock						
<input type="checkbox"/>	HRU01	Stock	300019	Exercising Your Options						
<input type="checkbox"/>	HRU01	Stock	300018	Reporting Stock Sales						

**Modified** 04/02/2013 11:16AM PDT **SAMPLE**

## Solution to Display on Top Solutions Pagelet Section

### Solution Summary

Click the Solution Summary link to drill into solution and open the solution details in a separate window.



Click the Delete row icon to remove a solution so that it is not displayed on the Top Solutions pagelet on the home page.

### Order

Specify the order in which the solutions will be displayed in the Top Solutions pagelet and click the Save button.

## Search Section

Search for solutions using one or more of the following search criteria:

- Use Saved Search
- SetID
- Solution Library
- Solution Summary
- Usage Count
- Solved Count
- Self Service Usage Count
- Self Service Solved Count
- Self Service Unsolved Count
- Last Usage

## Search Results Section

This section displays solutions based on the search criteria and are filtered by solutions that are not marked as FAQ with Type = Standard, Status = Active, Visibility = All and solutions that are not expired. Only solutions that are not already added to the Top Solutions pagelet are displayed in the search results.

### Add to Top Solution

Select one or multiple solutions in the Search results and click the Add to Top Solutions button.

---

**Note:** It is recommended to keep this list to less than 15 solutions since these represent the top solutions and all top solutions will be displayed in this pagelet.

---

### Solution Summary

Click a Solution Summary link to view the solution details in a separate window.

## Home Page - Search Pagelet Page

Use the Home Page - Search Pagelet page (RC\_SS\_FACET) to set up the Search Here for Answers pagelet on the home page by selecting the facets and values under each facet to be displayed.

## Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Search Pagelet

### Image: Home Page - Search Pagelet page

This example illustrates the fields and controls on the Home Page - Search Pagelet page.

The screenshot displays the 'Facets on Search Pagelet' interface, which allows users to filter search results. It is organized into four main sections:

- Facets on Search Pagelet:** A top section with checkboxes for 'Content Type' (checked), 'Category' (unchecked), 'Topic' (checked), and 'Product Group' (unchecked).
- Content Type:** A section below the first facet with checkboxes for 'Solutions' (checked), 'Frequently Asked Questions' (checked), and 'Known Issues' (checked).
- Categories:** A section with a 'Personalize' link, 'Find', 'View All', and navigation controls. It includes a '\*SetID' dropdown menu and a '\*Category' text input field with a search icon. Below this is an 'Add Category' button.
- Topics:** A section with a 'Personalize' link, 'Find', 'View All', and navigation controls. It includes a table with columns '\*SetID' and '\*Topic'. The table contains four rows:
 

*SetID	*Topic
HRSQL	Benefits
HRSQL	Life Events
HRSQL	Payroll
HRSQL	Stock

 Each row has a search icon and a trash icon. Below the table is an 'Add Topic' button.
- Product Groups:** A section with a 'Personalize' link, 'Find', 'View All', and navigation controls. It includes a '\*SetID' dropdown menu and a '\*Product Group' text input field with a search icon. Below this is an 'Add Product Group' button.

### Facets on Search Pagelet

Select the facets to be displayed on the Search Here for Answers pagelet.

### Content Type

Select the content types to be displayed on the Search Here for Answers pagelet. The different content types include Solutions, Frequently Asked Questions, and Known Issues.

### Categories

Select the categories to be displayed under the Category facet on the Search Here for Answers pagelet. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The Category lookup displays all categories that have an active combination under Combine Category Type Detail component for the selected Set Id.

**Topics**

Select the Solution Libraries to be displayed under the Topic facet on the Search Here for Answers pagelet. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The topic lookup displays all Solution Libraries for the selected Set ID.

**Product Groups**

Select the Product Groups to be displayed on the Search Here for Answers pagelet. The SetID drop-down list displays the set ids that correspond to the Business Unit for the display template family of the home page. The Product Group lookup displays the product groups for the selected Set ID.

**Home Page - FAQ Page**

Use the Home Page - FAQ page (RC\_SS\_FAQ) to select the Top Frequently Asked Questions to be displayed in the FAQ pagelet on the home page across different Set Ids and Solution Libraries.

## Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, FAQ

### Image: Home Page - FAQ page (1 of 2)

This example illustrates the fields and controls on the Home Page - FAQ page (1 of 2).

Display Template Family Code CRM\_HHD  
Description HR HelpDesk Case Family

Order	SetID	Description	Solution Library	Library FAQ	Solution ID	Visibility	External FAQ	FAQ	
<input checked="" type="checkbox"/>	10	HRU01	HRHDUSA	Life Events	<input checked="" type="checkbox"/>	300053	All	<input checked="" type="checkbox"/>	What to do when you are Hired
<input checked="" type="checkbox"/>	20	HRU01	HRHDUSA	Benefits	<input checked="" type="checkbox"/>	300008	All	<input checked="" type="checkbox"/>	How do I enroll in the 401K program?
<input checked="" type="checkbox"/>	30	HRU01	HRHDUSA	Payroll	<input checked="" type="checkbox"/>	300026	All	<input checked="" type="checkbox"/>	Withholdings: FAQs
<input checked="" type="checkbox"/>	40	HRU01	HRHDUSA	Life Events	<input checked="" type="checkbox"/>	300089	All	<input checked="" type="checkbox"/>	Spouse/Domestic Partner Change in Job Status
<input checked="" type="checkbox"/>	50	HRU01	HRHDUSA	Benefits	<input checked="" type="checkbox"/>	300016	All	<input checked="" type="checkbox"/>	Birth/Adoption of a Child - What to do when the child arrives
<input checked="" type="checkbox"/>	60	HRU01	HRHDUSA	Benefits	<input checked="" type="checkbox"/>	300021	All	<input checked="" type="checkbox"/>	Changing your PCP (Primary Care Physician)
<input checked="" type="checkbox"/>	70	HRU01	HRHDUSA	Benefits	<input checked="" type="checkbox"/>	301297	All	<input checked="" type="checkbox"/>	Annual Performance Review - Overview

Personalize | Find | First 1-7 of 7 Last

Enter or select the criteria you want to appear in the list of FAQs and click Search.

Search

Use Saved Search

\*SetID = HRU01

Library =

Search Clear Save Search Criteria Delete Saved Search Personalize Search

Modified 04/02/2013 11:17AM PDT SAMPLE

Save Return to Search Previous in List Next in List Notify

### Image: Home Page - FAQ page (2 of 2)

This example illustrates the fields and controls on the Home Page - FAQ page (2 of 2).

SetID = HRU01 AND Library = Stock

Search

Use Saved Search

\*SetID = HRU01

Library = STOCK

Search Clear Save Search Criteria Delete Saved Search Personalize Search

Solution Library	Solution ID	FAQ	Date Created	Date Modified
<input type="checkbox"/> Stock	300005	What is the Employee Stock Purchase Plan, or ESPP?	03/23/2009 5:27AM	03/23/2009 5:27AM
<input type="checkbox"/> Stock	300018	Reporting Stock Sales	03/23/2009 5:27AM	03/23/2009 5:27AM
<input type="checkbox"/> Stock	300019	Exercising Your Options	03/23/2009 5:27AM	03/23/2009 5:27AM
<input type="checkbox"/> Stock	300020	Trading Window for Company Stock	03/23/2009 5:27AM	03/23/2009 5:27AM

Add to Top FAQ

Modified 04/02/2013 11:17AM PDT SAMPLE

Save Return to Search Previous in List Next in List Notify

The page displays the list of FAQ that have been selected to display on the Top FAQ pagelet. The fields and controls in the Home Page - FAQ page are similar to the fields and controls in the Home Page - Top Solutions page. See the [Home Page - Top Solutions Page](#) topic for more information.

## Home Page - Known Issues Page

Use the Home Page - Known Issues page (RC\_SS\_ISSUES) to select the Global Cases to be displayed to a self-service user.

### Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Known Issues

### Image: Home Page - Known Issues page

This example illustrates the fields and controls on the Home Page - Known Issues page.

Display Template Family Code CRM_HHD					
Description HR HelpDesk Case Family					
<div> <a href="#">Personalize</a>   <a href="#">Find</a>       </div> <div> <a href="#">First</a>   <a href="#">1-11 of 11</a>   <a href="#">Last</a> </div>					
Select	Business Unit	Case ID	Summary	Status	Date Created
<input checked="" type="checkbox"/>	HRH DU	220557	ESPP Enrollment	Open - Research	07/03/2012
<input checked="" type="checkbox"/>	HRH DU	220561	Salary increment not on payslip	Open - New	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220562	ESSP Enrollment open period	Open - Research	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220563	Excess State Tax on paycheck	Open - New	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220564	Is Palo Alto Medical group dropped	Open - New	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220565	How to get a printed Payslip	Open - New	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220566	The Holiday list is missing	Open - Research	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220567	10 year anniversary gift taxable	Open-Pend Employee	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220568	New Job Description not in directory	Open - New	08/01/2012
<input checked="" type="checkbox"/>	HRH DU	220569	New Baby	Open - New	08/01/2012
<div> <b>Modified</b> 04/02/2013 11:17AM PDT    SAMPLE         </div> <div>  Save    Return to Search    Previous in List    Next in List    Notify         </div>					

The Home Page - Known Issues page displays cases that are Global, Non-secured, with Visibility set to external and Open or On-Hold. It displays cases across all Business Units that are relevant to the Display Template Family. The cases are sorted by Date Created. You can click the Case ID link to view case details in a separate window. Select or deselect the global case to be displayed in the Known Issues pagelet.

## Home Page - Shortcuts Page

Use the Home Page - Shortcuts page (RC\_SS\_LINKS) to set up HCM or Campus Solutions shortcut links to be displayed on the Home page.

## Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Shortcuts

### Image: Home Page - Shortcuts page

This example illustrates the fields and controls on the Home Page - Shortcuts page.

**Link Group** HRMSS HRMS Self Service

**Link Category** Benefits **Category Order**

Display in Pagelet	Link Order	Version	Link Name
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	9.2	Benefits Summary
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	9.2	Dependents/Beneficiary Info

**Link Category** Compensation **Category Order**

Display in Pagelet	Link Order	Version	Link Name
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	9.2	Compensation History
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	9.2	Stock Options Summary
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	9.2	View Paycheck

**Link Category** Job Related **Category Order**

Display in Pagelet	Link Order	Version	Link Name
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	9.2	Absence Request
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	9.2	Company Directory
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	9.2	Manager Dashboard
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	9.2	Learning Home Page
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	9.2	Performance Document
<input checked="" type="checkbox"/>	<input type="text" value="6"/>	9.2	Timesheet
<input checked="" type="checkbox"/>	<input type="text" value="7"/>	9.2	My Career Profile

**Link Category** Personal Information **Category Order**

Display in Pagelet	Link Order	Version	Link Name
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	9.2	Personal Information Summary

The Administrator can use the Home Page - Shortcuts page to set up the shortcut links to be displayed in the Shortcuts pagelet. These Shortcuts are integration points to HCM, EBS or Campus Solutions. The Administrator can set up any number of links to the commonly used components in HCM, EBS, or Campus Solutions.

The Shortcuts are defined using Link Groups, Link Categories and Link Definitions, which is existing functionality. The administrator can add the Link Definitions to the Shortcuts pagelet. Link Definitions that have been marked as Self Service will be available to be added to the Shortcuts pagelet.

**Note:** The Administrator can use the Link Group component (RC\_LINK\_GROUP) [Set Up CRM, Product Related, Call Center, Link Group] to set up a Link Group containing the required Link Categories and corresponding Links to be displayed on the Shortcuts pagelet.

The Administrator can select the Display in Pagelet check box to select the links to be displayed in the Home Page - Shortcuts page. The Administrator can also specify the Link Order and Category Order for the pagelet.



## Home Page - Quick Links Page

Use the Home Page - Quick Links page (RC\_SS\_QUICK\_LINKS) to set up the quick links to be displayed in the Quick Links pagelet.

### Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Quick Links

### Image: Home Page - Quick Links page

This example illustrates the fields and controls on the Home Page - Quick Links page.

**Display Template Family Code** CRM\_HHD

**Description** HR HelpDesk Case Family

**Link Group** QLHHD Quick Links HR HelpDesk

Display in Pagelet	Link Order	Version	Link Name	Link Image	
<input type="checkbox"/>		OTH	Create Case	Create Case Self Service	
<input checked="" type="checkbox"/>	1	OTH	Troubleshooting Guide	How To Self Service	
<input checked="" type="checkbox"/>	2	OTH	FAQ	FAQ Self Service	
<input checked="" type="checkbox"/>	3	OTH	Find Cases	Find Cases Self Service	
<input checked="" type="checkbox"/>	4	OTH	Create Case	Create Case Self Service	
<input checked="" type="checkbox"/>	5	OTH	Email Agent	Email Agent Self Service	
<input checked="" type="checkbox"/>	6	OTH	Chat with Agent	Chat With Agent	
<input checked="" type="checkbox"/>	7	OTH	HRMS Employee Self-Service	HRMS Employee Self Service	
<input checked="" type="checkbox"/>	8	OTH	HRMS Manager Self-Service	HRMS Manager Self Service	

**Modified** 04/02/2013 11:17AM PDT SAMPLE

The Home Page - Quick Links page allows the Administrator to select Quick Links to be displayed to a self-service user and specify their order of appearance in the pagelet. Quick Links are provided to quickly navigate to some of the most used self-service pages in the application. The Administrator can add the Link Definitions to the Quick Links pagelet. Link Definitions that have been marked as Self Service will be available to be added to the Quick Links pagelet. Administrators can set up the quick links to be displayed in the Quick Links pagelet.

**Note:** The Quick Links are defined using Link Category Definition page, Link Definition page, and Link Group page.

There are two types of Create Case pages. The Administrators can enable one of the Create Case pages to appear in the home page as business requirements.

## Home Page - Chat Schedule Page

Use the Home Page - Chat Schedule page (RC\_SS\_AGT\_SCHEDULE) to set up Chat Schedule.

## Navigation

Set Up CRM, Product Related, Call Center, Self-Service Configuration, Home Page, Chat Schedule

### Image: Home Page - Chat Schedule page

This example illustrates the fields and controls on the Home Page - Chat Schedule page.

Display Template Family Code CRM\_HHD  
Description HR HelpDesk Case Family

**Holiday Schedule**  
Time Zone PST Pacific Time (US)  
Holiday Schedule

**Hours of Operation**

☒ **Monday**  
Hours on Monday  
Start Time End Time  
8:00AM 5:00PM + -

☒ **Tuesday**  
Hours on Tuesday  
Start Time End Time  
8:00AM 5:00PM + -

☒ **Wednesday**  
Hours on Wednesday  
Start Time End Time  
8:00AM 5:00PM + -

☒ **Thursday**  
Hours on Thursday  
Start Time End Time  
8:00AM 5:00PM + -

☒ **Friday**  
Hours on Friday  
Start Time End Time  
8:00AM 5:00PM + -

☐ **Saturday**  
Hours on Saturday  
Start Time End Time  
+ -

☐ **Sunday**  
Hours on Sunday  
Start Time End Time  
+ -

Modified 04/02/2013 11:17AM PDT SAMPLE

Save Return to Search Previous in List Next in List Notify

The Administrator defines the Hour of Operations for each day of the week during which the Chat agents will be available using the Home Page - Chat Schedule page. The Chat Schedule works based on the Display Template family defined. This helps to maintain different chat schedules for Support and Helpdesk call centers. The Time Zone and Hours of Operations are defaulted from the Calendar Options (Main Menu, Setup CRM, Install, Installation Options). The Administrator can select a different Time Zone, if needed. The Chat with Agent link is displayed on the Quick Links pagelet when a self-service user logs in during these hours. The Holiday Schedule page (HOLIDAY\_SCHED\_TBL) [Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule] specifies the days during which the Chat will not be available for the user.

An Administrator can configure a Live Chat with Agent section to appear on various pages using the Chat Enabled Page Setup page (RB\_CHAT\_ADMIN) [Setup CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup]. The Chat Schedule set in the Home Page - Chat Schedule page affects this functionality as well. If the Chat with Agent functionality is enabled for a page (e.g. Contact Us page), then during runtime, the Live Chat with Agent section or Chat with Agent button is displayed only when a self-service user logs in during the Hour of Operations set through the Chat Schedule setup. Otherwise, Live Chat with Agent section or Chat with Agent button is not displayed.

When the chat functionality is configured, the following pages have the Chat with Agent button:

- Troubleshooting Guide page
- FAQ page
- Create Case pages
- Open/Display Case pages

- Search page
- Solution Details page
- Known Issues page
- Change Request page
- Internal Contact page
- Customer Selection page

## Personalize Content: <Service Center Name> Page

Use the Personalize Content: <Service Center Name> page (PORTAL\_HPCOMP) to personalize the name of the home page, Welcome message, and select pagelets to be displayed.

### Navigation

Click the Personalize Content link on the top-right corner of the Self-Service Service Center Home page.

### Image: Personalize Content: <Service Center Name> page

This example illustrates the fields and controls on the Personalize Content: <Service Center Name> page.

Personalized Home Page

Personalize Content: **Campus Service Center**

Tab Name

Welcome Message

Choose Pagelets:    Simply check the items that you want to appear on your homepage.  
Remember to click "Save" when done.

Arrange Pagelets:    Go to [Personalize Layout](#)

Services

☒ Welcome Banner
☒ Welcome Message

Higher Education

☒ Quick Links
☒ Campus Shortcuts
☒ Search Here for Answers
☒ Known Issues
☒ FAQ
☒ Top Solutions
☒ My Recent Cases

Save

[Return to Home](#)

Notify

## Personalize Layout: <Service Center Name> Page

Use the Personalize Layout: <Service Center Name> page (PORTAL\_HPLAYOUT) to personalize the name of the home page, Welcome message, and select pagelets to be displayed.

### Navigation

Click the Personalize Layout link on the top-right corner of the Self-Service Service Center Home page.

### Image: Personalize Layout: <Service Center Name> page

This example illustrates the fields and controls on the Personalize Layout: <Service Center Name> page.

Personalized Home Page

**Personalize Layout: Campus Service Center**

Tab Name: Campus Service Center

Basic Layout: ☐ 2 columns ☒ 3 columns

Click arrows to move pagelets up and down or into neighboring columns. Click "Delete Pagelet" to remove the selected pagelet from your portal home page. Remember to click "Save" when done.

Add Pagelets: [Go to Personalize Content](#)

# = Required - fixed position pagelet  
\* = Required - moveable pagelet

Left Column:	Center Column:	Right Column:
Quick Links	Welcome Message	Known Issues
Campus Shortcuts	Welcome Banner	My Recent Cases
	Search Here for Answers	FAQ
	Top Solutions	

[Delete Pagelet](#)

[Save](#) [Return to Home](#)

[Notify](#)

## Viewing the Self-Service Pagelets

You can personalize the appearance of the pagelets in the self-service home page. You can define the the position of the pagelets and select the pagelets that need to be displayed on the home page. This topic illustrates how to personalize the pagelets and also describes the features in the pagelets.

A guest user has limited access to the Support self-service home page. A guest user is applicable only to Support and Higher Education verticals. The guest user can view the following pagelets:

- Search
- Top Solutions
- FAQ
- Discussion Forums

- Quick Links

These topics discuss:

- Viewing the Search Here for Answers pagelet.
- Viewing the Top Solutions pagelet.
- Viewing the FAQ pagelet.
- Viewing the Known Issues pagelet.
- Viewing the My Recent Cases pagelet.
- Viewing the Discussion Forums pagelet.
- Viewing the Shortcuts pagelet.
- Viewing the Quick Links pagelet.

## Pages Used to View Additional Self-Service Home Page Content

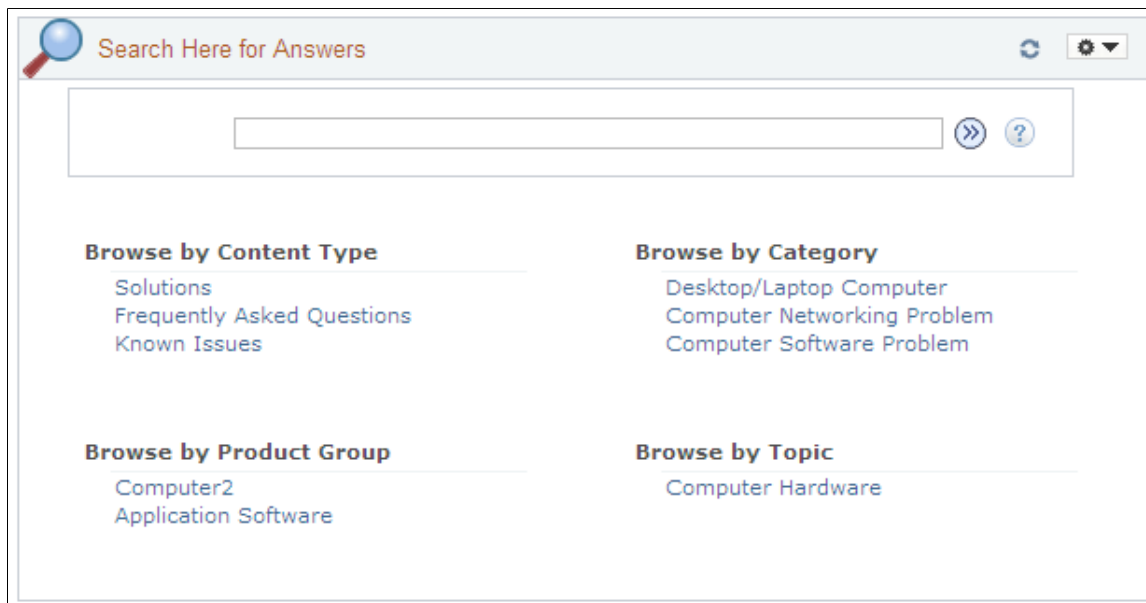
<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search	RC_SS_SOLNSRCH	<ul style="list-style-type: none"> <li>• Specify a keyword or leave the search field blank and click the Search icon in the Search Here for Answers pagelet.</li> <li>• Click a link under a facet in the Search Here for Answers pagelet.</li> </ul>	View content related to the search keyword or category.
Solution Details	RC_SS_SOLNDTLS	Click a Solution Summary link in the Top Solutions pagelet.	View the summary, symptoms, and details of the solution.
Frequently Asked Question	RC_FAQ_DETAILS_SS	Click an FAQ link or the View All link in the FAQ pagelet.	View the details of an FAQ.
Known Issues	RC_KNOWN_ISSUES_SS	Click the View All link on the Known Issues pagelet.	View a list of all known issues.

## Search Here for Answers Pagelet

The Search Here for Answers pagelet allows the user to search by keyword and browse through content.

### Image: Search Here for Answers pagelet

This example illustrates the fields and controls on the Search Here for Answers pagelet.



Type a keyword in the search field and click the Search icon.

Search results are displayed in the Search page. You can further drill down the search results by using one or more facets displayed in the Filter by section displayed to the left of the Search Results.

### Facets

Facets categorize available content. You can use the links listed in a facet to browse through content, for e.g. Solutions link under the Browse by Content Type facet. Facets appear based on availability of the content type in the search results.

## Search Page

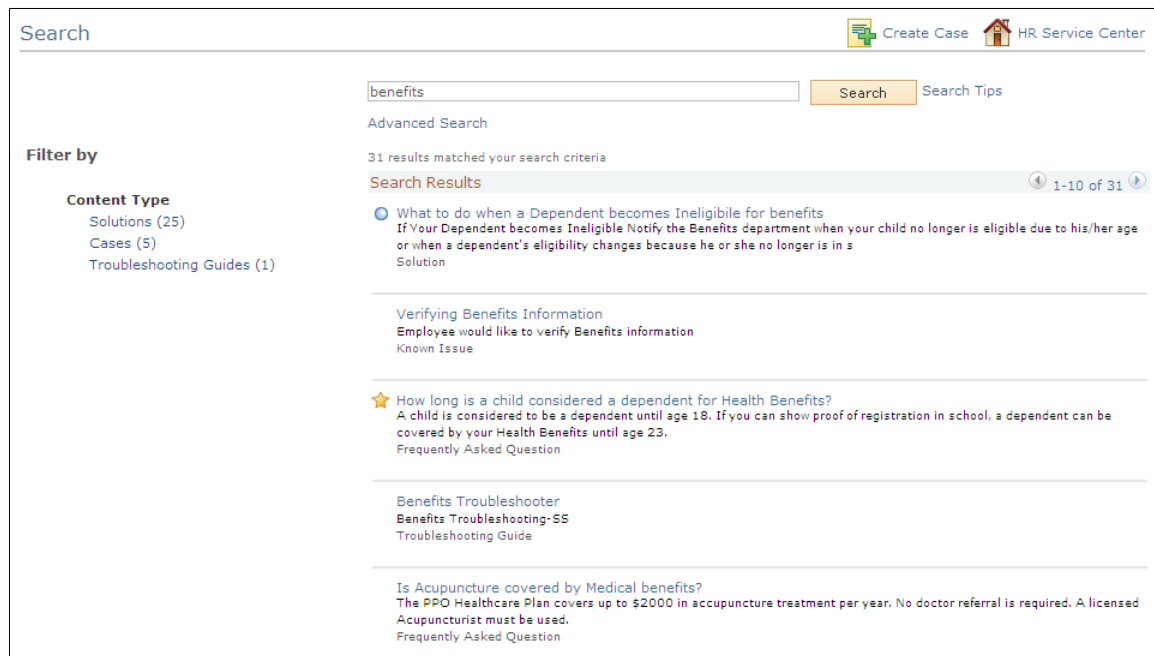
Use the Search page (RC\_SS\_SOLNSRCH) to view content related to the search keyword or category.

## Navigation

- Specify a keyword or leave the search field blank and click the Search icon in the Search Here for Answers pagelet.
- Click a link under a facet in the Search Here for Answers pagelet.

## Image: Search page

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



When you perform a keyword search or browse by facets the results are displayed in a new page. The results display Solutions, FAQ, Known Issues, and Troubleshooting Guides. You can click the relevant link to view the Solution, FAQ, or Known Issue details. The content type is displayed in the last line. Only content specific to the Display Template Family's Business Units is displayed in the search results. If the user has BU security set up, only content relevant to the Business Units that the user can access will be displayed in the search results.

For keyword based search, the search results are sorted by the SES score in descending order of score. The least score for which the results are displayed is defined by the administrator.



This is determined by the number of days a solution is considered to be new as defined in the Call Center setup for Business Unit.



This icon is displayed for any solution that an Administrator has marked as a top solution to be shown in the Top Solutions pagelet on the Home Page.



A solution is considered to be failed if the user clicks on the No button on the solution for the question "Did this resolve your issue?" If the user performs a new search in the same session (before logging off and logging back in) and it brings up a

solution that the user had marked as failed resolution in that session, this icon will still be displayed.



A solution is considered to be successful if the user clicks on the Yes button on the solution for the question “Did this resolve your issue?” If the user performs a new search in the same session (before logging off and logging back in) and it brings up a solution that the user had marked as a successful resolution in that session, this icon will still be displayed.



A search result is considered to be viewed if the user drills into a search result. If the user performs a new search in the same session (before logging off and logging back in) and it brings up content that the user had already viewed, this icon will still be displayed. The existing icon for any search result will be changed to Viewed once the result is viewed. The icon for a failed solution will not be changed to Viewed if the user views the solution again.

#### **No icon**

A solution that is not new or top or failed or viewed is displayed without any icon. FAQ and Known Issues that are not viewed is displayed without any icon. However, if the user views the failed solution again and submits feedback that the solution worked, the icon will be changed to Successful.



Bread crumbs with the search criteria are displayed above the search results. You can click the Remove Filter icon to the right of a filter displayed in the bread crumb to remove the filter.

#### **Clear All Filters**

Click this link to clear all applied filters from the search results.

#### **Search**

You can type a new keyword in the Search field and click the Search button to perform a new search. All applied filters are removed.

#### **<Self-Service> Service Center**

Click this link to go back to the home page.

#### **Create Case**

If you do not find an appropriate solution, you can click the Create Case link to log a case.

#### **Facets**

Use the facets on the left to drill down further into the results.

#### **Advanced Search**

Click this link to search for solutions using additional criteria.



## Top Solutions Pagelet

The Top Solutions pagelet displays a list of top solutions selected by the Administrator, if any.

### Image: Top Solutions pagelet

This example illustrates the fields and controls on the Top Solutions pagelet.



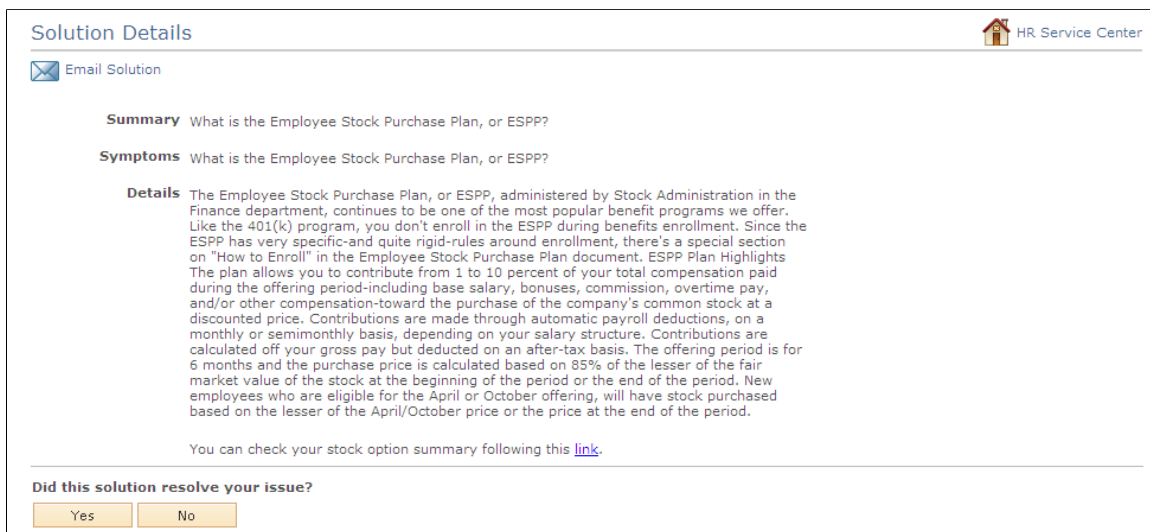
You can click a Solution link to view the Solution Details page.

## Solution Details Page

Use the Solution Details page (RC\_SS\_SOLNDTLS) to view the summary, symptoms, and details of the solution.

### Image: Solution Details page

This example illustrates the fields and controls on the Solution Details page.



### Email Solution

This button enables the user to email the solution.

### Yes No

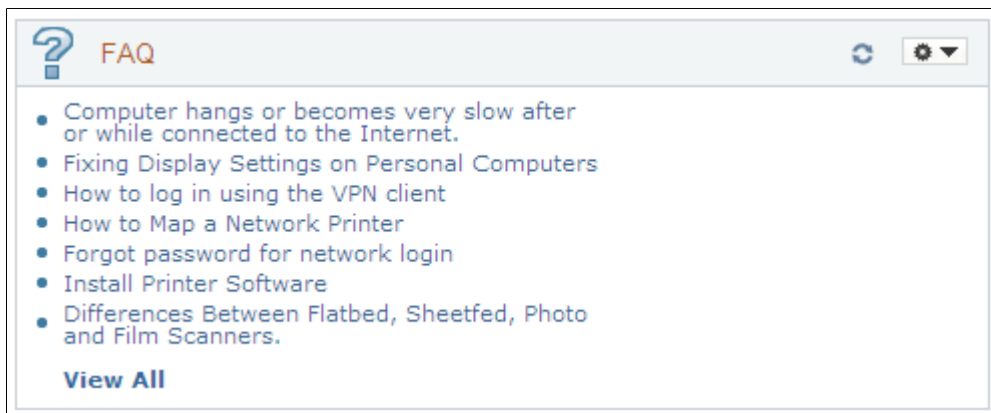
Use these buttons to indicate if the solution resolved your issue.

## FAQ Pagelet

The FAQ pagelet lists the top FAQ selected by the Administrator.

### Image: FAQ pagelet

This example illustrates the fields and controls on the FAQ pagelet.



### FAQ

Click an FAQ link to view the details of the FAQ in the Frequently Asked Question page. The FAQ details for the selected FAQ are highlighted in the Frequently Asked Question page.

### View All

You can click the View All link to view all FAQ in the Frequently Asked Question page.


You can click an FAQ link to view the description of the FAQ.

## Frequently Asked Question Page

Use the Frequently Asked Question page (RC\_FAQ\_DETAILS\_SS) to view the details of an FAQ.

### Image: Frequently Asked Question page (1 of 2)

This example illustrates the controls on the Frequently Asked Question page (1 of 2).

Frequently Asked Question	 HR Service Center
<b>Benefits</b> 401K Matching: When is the company match applied to my account? 401K Summary Plan Description (SPD) Annual Performance Review - Overview Annual Performance Review - Salary adjustment Birth/Adoption of a Child - What to do when the child arrives Changing your PCP (Primary Care Physician) How do I enroll in the 401K program? How do I make changes to my Benefits Enrollments? How do I process a rollover into the company 401(k) Plan? How do I request a new 401K Account PIN if I've forgotten mine? How long is a child considered a dependent for Health Benefits? How to view your benefits summary Increasing your 401K deductions with EGTRRA Is Acupuncture covered by Medical benefits? Leaves of Absence Marriage/Begin Domestic Partnership - What to do? U.S. Holiday Schedule 2002 What is my default PIN if I have never accessed the 401(k) hotline or web site? What to do when a Dependent becomes Ineligible for benefits When and how are 401(k) statements released? Where can I find information about the Personal Choice Retirement Account (PCRA) Workers' Compensation FAQs	
<b>Benefits California</b> Birth/Adoption of a Child - What to do when the child arrives Case Resolved in Self-Service How do I enroll in the 401K program? How long is a child considered a dependent for Health Benefits? How to update your Personal Information How will paycheck deductions changes affect my take home pay? Increasing your 401K deductions with EGTRRA Is Acupuncture covered by Medical benefits?	
<b>Life Events</b> Checklist for Pregnancy/Adoption of Child Divorce/End Domestic Partnership - What to do? If You Become Disabled and Cannot Work Leaves of Absence Spouse/Domestic Partner Change in Job Status	

### Image: Frequently Asked Question page (1 of 2) with the FAQ highlighted

This example illustrates the fields and controls on the Frequently Asked Question page (2 of 2).

**Birth/Adoption of a Child - What to do when the child arrives**

Notify the Benefits department and make any benefits changes within 30 days of your child's arrival. Use the family status change form found online to declare your change. Provide the Benefits department with proof of birth or adoption papers. Enroll your newborn or newly adopted child in company benefits plans within 30 days of the birth date or day of placement. If you do not enroll your child within 30 days, you will have to wait until the next Open Enrollment period unless you experience another qualified family status change. Once enrolled, the effective date of coverage will be retro-active to the birth date or placement date of the baby. Consider the benefits changes described in the Changes to Consider section. You have 30 days to request a change. Consider updating your beneficiary forms, your W-4 withholding information, and your will. To update your tax withholding, complete the tax forms found on the Payroll intranet site.

**Changing your PCP (Primary Care Physician)**

A change in your Primary Care Physician can be done instantly by phoning your Medical Carrier to make the change. You must insure that the new PCP is accepting patients and s/he is an In-Network Provider. In Network Providers in your area can be found at [www.yourmedicalcarrier.com](http://www.yourmedicalcarrier.com).

**How do I enroll in the 401K program?**

First, fill out an enrollment preparation sheet. Then go to the [401Kplan.com](http://401Kplan.com) Web site to complete your enrollment. Don't forget to use your default PIN (your employee id) when accessing 401KPlan. Enrollments must be completed by the 12th of the month prior to the market close (1 p.m. PST or 4 p.m. EST) in order to take affect in that month's payroll.

Frequently Asked Questions is a single scrollable page that contains a list of all FAQs on the top within the individual topics (or solutions libraries). This list displays only the questions. The bottom portion of the page displays all FAQs with the questions and answers. When the user clicks on any FAQ in the list on top of the page, the page scrolls to the section that the FAQ belongs to. The selected FAQ is positioned on top of the page.

The users can alternately click the FAQ link in Quick Links pagelet to get to the FAQ and can click the <Home Page> Service Center link to go back to the home page.

## Known Issues Pagelet

The Known Issues pagelet displays global cases. Global cases are cases that impact multiple users and have been marked as Global.

### Image: Known Issues pagelet

This example illustrates the fields and controls on the Known Issues pagelet.

**Known Issues**

- Printer is not available
- Network is very slow
- Not able to connect to CRM system
- Not able to login to Email server
- The phones on 4th floor are not working.

[View All](#)

### Known Issue

The Known Issues pagelet displays 5 most recent cases that have been made accessible to self service users. Click a known issue link to view the Case <ID> page.

**View All**

Click the View All link to view a list of all known issues in the Known Issues page.

**Known Issues Page**


Use the Known Issues page (RC\_KNOWN\_ISSUES\_SS) to view a list of all known issues.

**Navigation**

Click the View All link on the Known Issues pagelet.

**Image: Known Issues page**

This example illustrates the fields and controls on the Known Issues page.

Known Issues				 HR Service Center
Case ID	Summary	Status	Created On	Notify Me
220557	ESPP Enrollment	Open - Research	07/03/2012	<input type="checkbox"/>
220561	Salary increment not on payslip	Open - New	08/01/2012	<input checked="" type="checkbox"/>
220562	ESSP Enrollment open period	Open - Research	08/01/2012	<input type="checkbox"/>
220563	Excess State Tax on paycheck	Open - New	08/01/2012	<input type="checkbox"/>
220564	Is Palo Alto Medical group dropped	Open - New	08/01/2012	<input type="checkbox"/>
220565	How to get a printed Payslip	Open - New	08/01/2012	<input type="checkbox"/>
220566	The Holiday list is missing	Open - Research	08/01/2012	<input type="checkbox"/>
220567	10 year anniversary gift taxable	Open-Pend Employee	08/01/2012	<input type="checkbox"/>
220568	New Job Description not in directory	Open - New	08/01/2012	<input type="checkbox"/>
220569	New Baby	Open - New	08/01/2012	<input type="checkbox"/>
220570	Marital Status Change	Open-Pend Employee	08/01/2012	<input type="checkbox"/>

**Notify Me**

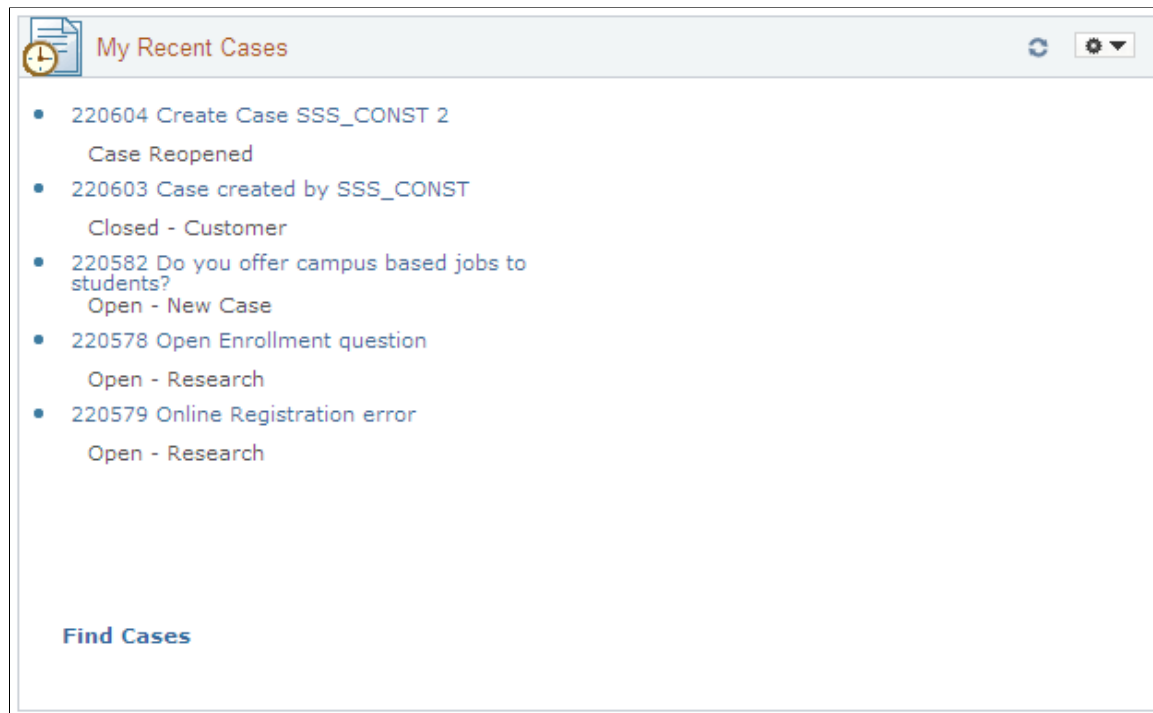
Select the check box for a case to receive notifications about the case progress.

## My Recent Cases Pagelet

My Recent Cases pagelet displays the most recent cases created for the self service user across all Business Units.

### Image: My Recent Cases pagelet

This example illustrates the fields and controls on the My Recent Cases pagelet.



The My Recent Cases pagelet displays a maximum of 5 cases and displays the Case ID, Case Summary, and Case Status for each case. The pagelet displays the cases created by the logged in user, an agent, or cases created by another user on behalf of the logged in user.

#### Link Case

Click the Link Case link to view case details in the Case <ID> page.

#### Find Cases

Click the Find Cases link to view the Find Cases page. See the <placeholder> topic for more information about the Find Cases page. The Find Cases page allows you to perform a search based on predefined search criteria.

## Discussion Forums Pagelet

The Discussion Forums pagelet allows users to view and participate in discussions.

Users can be a member of one or more communities in the Enterprise Portal. The discussion forums pagelet displays the most recent discussion across all communities that the user belongs to.

---

**Note:** PeopleSoft CRM does not deliver a pagelet definition for Discussion Forum. See *PeopleSoft HCM 9.1: Viewing Discussion Forum Pagelets within Your Application [ID 1480882.1]* in the [My Oracle Support](#) website for more information on implementing the Discussion Forum pagelet.

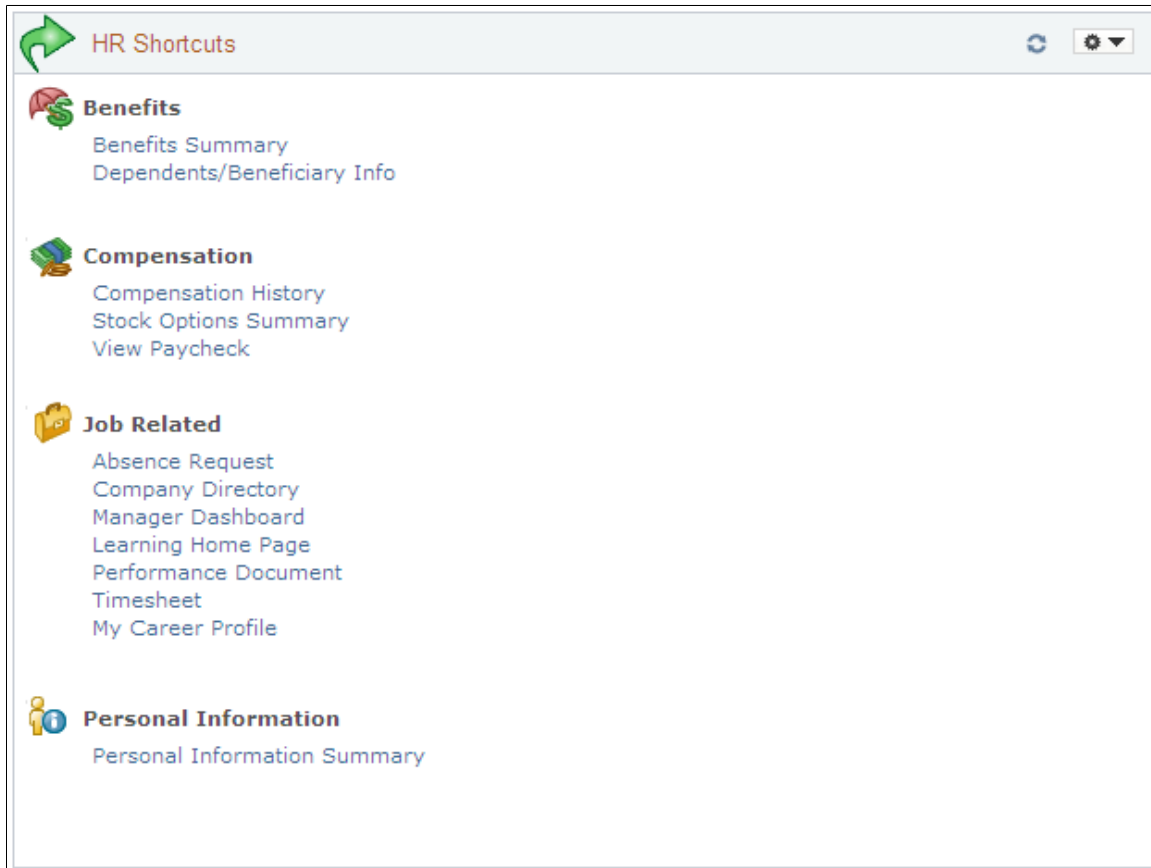
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## Shortcuts Pagelet

The Shortcuts pagelet displays links to commonly used components in HCM, EBS, or Campus Solutions. A sample set is available for each pillar. The Administrator can configure their own set of shortcuts. Shortcuts are applicable only to HR Service Center and Campus Service Center Home Pages. The Shortcuts pagelet is called the HR Shortcuts pagelet in the HR Service Center and called Campus Shortcuts for Campus Service Center.

### Image: HR Service Center - HR Shortcuts pagelet

This example illustrates the fields and controls on the HR Service Center - HR Shortcuts pagelet.



The following table lists the category, action, and navigation path of links on the HR Service Center - HR Shortcuts pagelet in PeopleSoft HCM 9.2, 9.1, and 9.0.

All shortcuts in the table have been delivered for 9.2. However, only the shortcuts marked Y are displayed in the delivered HR Shortcuts pagelet. For example, the Manager Dashboard link is displayed only if the logged-on user is a manager.

Category	Action	Navigation	HCM 9.2	HCM 9.1	HCM 9.0
Personal Information	Personal Information	Self Service, Personal	Y	Y	Y
Personal Information	Summary				

<b>Category</b>	<b>Action</b>	<b>Navigation</b>	<b>HCM 9.2</b>	<b>HCM 9.1</b>	<b>HCM 9.0</b>
Job Related	Company Directory	Company Directory	Y		
Job Related	Manager Dashboard	Manager Dashboard	Y		
Job Related	Absence Request	Self Service, Time Reporting, Report Time, Absence Request	Y	Y	Y
Job Related	Performance Documents	Self Service, Performance Management, My Performance Management, Current Documents	Y	Y	Y
Job Related	Learning Home	(New in 9.2)	Y		
Job Related	Timesheet	Self Service, Time Reporting , Report Time, Timesheet	Y	Y	Y
Job Related	My Career Profile	Self Service, Career Planning, My Profile	Y	Y	
Compensation	View Paycheck	Self Service , Payroll and Compensation, View Paycheck	Y	Y	Y
Compensation	Compensation History	Self Service, Payroll and Compensation, Compensation History	Y	Y	Y
Compensation	Stock Options Summary	Self Service, Stock Activity, Stock Option Summary	Y	Y	Y
Benefits	Benefits Summary	Self Service, Benefits, Benefits Summary	Y	Y	Y
Benefits	Dependents/ Beneficiary Information	Self Service, Benefits, Dependents/ Beneficiary Info	Y	Y	Y

The following shortcuts are delivered with the EBS integration for the pagelet HR Shortcuts on the HR Helpdesk home page:

- Person Details



- Payslip
- Total Compensation
- Absence Management
- Benefits Summary

Campus Solutions shortcuts have been delivered only for the CS 9.0 release. The following shortcuts are delivered for in the pagelet Campus Shortcuts on the Higher Education dashboard:

For Student:

- Student Center (Self Service, Student Center)
- Personal Data Summary (Self Service, Campus Personal Information, Personal Data Summary)
- Request Admissions Information (Self Service, Student Admission, Request Information)
- Community Directory (Self Service, Community Directory Search)

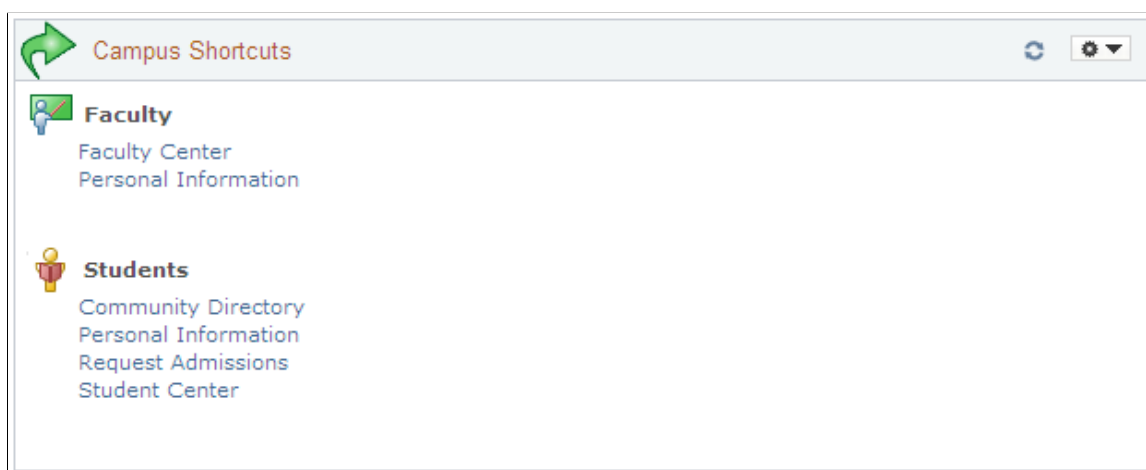
For Faculty:

- Personal Information (Self Service > Campus Personal Information > Personal Data Summary)
- Faculty Center (Self Service > My Schedule)

If a user has both roles – student and worker – then all the above shortcuts are displayed for that user.

### **Image: Campus Service Center - Campus Shortcuts pagelet**

This example illustrates the fields and controls on the Campus Service Center - Campus Shortcuts pagelet.

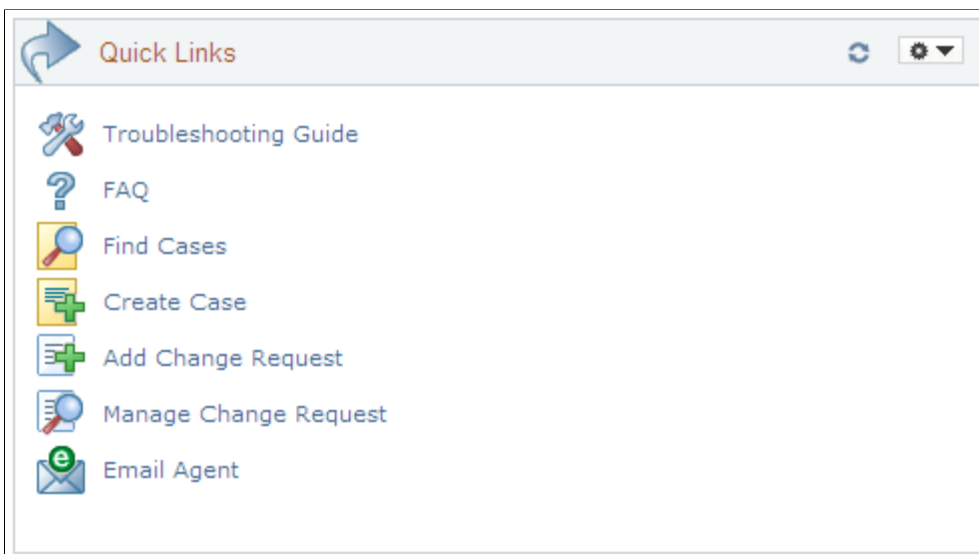


## Quick Links Pagelet

The Quick Links pagelet lists the quick links to access the features that are listed in the table below. The table also indicates the Service Center to which the feature is applicable.

### Image: Quick Links pagelet

This example illustrates the fields and controls on the Quick Links pagelet.



The following table lists the Quick Links and their availability in the different home pages.

<b>Feature</b>	<b>HR Service Center</b>	<b>IT Service Center</b>	<b>Customer Service Center</b>	<b>Campus Service Center</b>
Troubleshooting Guide	Yes	Yes	Yes	Yes
FAQ	Yes	Yes	Yes	Yes
Find Cases	Yes	Yes	Yes	Yes
Create Case	Yes	Yes	Yes	Yes
Email Agent	Yes	Yes	Yes	Yes
Chat with Agent	Yes	Yes	Yes	Yes
Add Change Request		Yes		
Manage Change Request		Yes		
Internal Contact			Yes	Yes
Customer Selection				Yes
HCM Employee Self-Service	Yes			

<b>Feature</b>	<b>HR Service Center</b>	<b>IT Service Center</b>	<b>Customer Service Center</b>	<b>Campus Service Center</b>
HCM Manager Self-Service	Yes			

## Creating Cases

The Case Creation process is a simplified user interface through which a self service user can create a case. Instead of showing all case fields on a single page, an administrator can configure multiple steps for the case creation process. The administrator can specify the fields that will be displayed on each page and a description of each step. Display Template is used to set this up. This section discusses how to:

- Create cases.
- Look up employees.
- Edit contact information.

## Pages Used to Add a Case

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Create Case	RC_CASE_SS_RPT1 RC_CASE_SS_RPT2 RC_CASE_SS_RPT3	<ul style="list-style-type: none"> <li>• Customer Care, Create Case</li> <li>• On the HR Service Center Home Page, click the Create Case link on the Quick Links pagelet.</li> <li>• Employee Self Service, HR Help Desk, Create Case</li> <li>• On the IT Service Center Home Page, click the Create Case link on the Quick Links pagelet.</li> <li>• Employee Self Service, Help Desk, Create Case</li> <li>• On the Campus Service Center Home Page, click the Create Case link on the Quick Links pagelet.</li> <li>• Service Center, Create Case</li> </ul>	Describe and submit a new problem.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Direct Report Look Up Employee	RC_CASE_HD_SS_DIRR	Click the Add Case for Direct Report link on the Create Case page.  Click the Add Case for Someone Else link on the Create Case page.	Look up and select an employee for whom you are adding a case.  The Add Case for Direct Report link is only available for PeopleSoft HR Service Center and the Add Case for Someone Else link is only available for PeopleSoft IT Service Center.
Edit Contact Information	RC_CASE_HD_SS_CNTC	Click the Edit Contact Details link on the Create Case page.	Update contact information for the employee that is the contact on the case.

## Create Case Page

Use the Create Case page (RC\_CASE\_SS\_RPT1, RC\_CASE\_SS\_RPT2, or RC\_CASE\_SS\_RPT3) to describe and submit a new problem.

## Navigation

- On the HR Service Center Home Page, click the Create Case link on the Quick Links pagelet.
- Employee Self Service, HR Help Desk, Create Case
- On the IT Service Center Home Page, click the Create Case link on the Quick Links pagelet.
- Employee Self Service, Help Desk, Create Case
- On the Campus Service Center Home Page, click the Create Case link on the Quick Links pagelet.
- Service Center, Create Case

### Image: HR Service Center - Create Case page (1 of 3)

This example illustrates the fields and controls on the HR Service Center - Create Case page (1 of 3).

**Create Case** HR Service Center

**Step 1 of 3: Update Contact**

Create Case For Justin Larson

Contact Details Change Contact Information

Add Case for Direct Report

Edit Contact Details

Next > Save My Case

### Image: HR Service Center - Create Case page (2 of 3)

This example illustrates the fields and controls on the HR Service Center - Create Case page (2 of 3) of the three step case creation process.

**Create Case** HR Service Center

**Step 2 of 3: Update Problem**

\*Summary

Details

Attach a File

\* Required Field

< Previous Next > Save My Case

**Image: HR Service Center - Create Case page (3 of 3)**

This example illustrates the fields and controls on the HR Service Center - Create Case page (3 of 3) of the three step case creation process.

**Create Case** HR Service Center

**Step 3 of 3: Update Details** ?

**Case Type** Question/Problem ▼

**Category** ▼

**Specialty Type** ▼

**Detail** ▼

**Priority** Medium ▼

**Severity** One Affected ▼

< Previous    Save My Case

**Create Case For**

This read-only field displays the name of the customer. It can be the name of the company where the self-service application user works.

**Add Case for Direct Report**

Click this link if you want to report a case on behalf of one of the people reporting directly to you. The system displays a list of your direct reports. To return to this page, select the employee for whom you want to report a case.

---

**Note:** The system displays this field for HR Service Center cases only. PeopleSoft delivers this field as enabled with a security option that allows managers with roles that are associated with the Choose Direct Report (RC\_CHOOSE\_DIRECT\_REPORT) functional option to enter cases on behalf of their direct reports. You can use the CRM\_HHD display template for the RC\_CASE\_HD\_SS\_RPT case component to disable this field or change the security option.

---

**Add Case for Someone Else**

Click this link if you want to report a case on behalf of someone else. The system displays a list of workers that are already entered into PeopleSoft CRM. To return to this page, select the worker for whom you want to report a case.

---

**Note:** The system displays this field for HelpDesk cases only.

PeopleSoft delivers this field as enabled with a security option that allows managers with roles that are associated with the On Behalf Of (RC\_ON\_BEHALF\_OF) functional option to enter cases on behalf of other workers. You can use the RC\_HELPDESK display template for the RC\_CASE\_HD\_SS\_RPT case component to disable this field or change the security option.

---

**Contact Details**

This read-only field displays the contact's primary contact method.

**Edit Contact Details**

Click this link to change the contact person specified in the Customer field or the Employee field.

**Attach a File**

Click this button to attach a file to the case.

**Summary, Details, Case Type, Category, Specialty Type, Detail, Priority, and Severity**

Select or enter information in these fields to describe the type of problem you are having.


**Save My Case**

When the user clicks the Save My Case button, depending on Display Template Details setup, the user is presented with a Submit Confirmation page with the case ID. The user can click the OK button to confirm the submission and view the Case

<ID> - Case Information page or the Case ID - Solutions Search page depending on the page set by the Administrator.


### Image: IT Service Center - Create Case page

This example illustrates the fields and controls on the IT Service Center - Create Case page (single step case creation process).


**Create Case**  IT Service Center


**Employee** Robert Harrison [Add Case for Someone Else](#)


**Contact Details** 925/694-2001(4785) [Edit Contact Details](#)


**\*Business Unit** IT Help Desk 

---

**Case Type** Technical Question 


**Product Group** 


**Product** 


 [View Product Hierarchy](#)


**Problem Type** Not Applicable


**Asset Tag** Not Applicable


**Category** 


**Specialty Type** 


**Detail** 

**Priority** Medium 

**Urgency** 

**Severity** Onetime Occurrence 

**\*Summary** 

**Details** 

---

[Attach a File](#)

\* Required Field

[Save My Case](#)

The visibility of page elements depends on how you configure the display template for this component. Also, some fields can be assigned default values based on business unit settings. The system enters default values even if the fields are hidden.



The Add Case page appears as a single step, two step, or three step process based on how it has been set up by the Administrator in the Display Template for the RC\_CASE\_SS component.

The display template for Self Service Case allows the administrator to:

- Indicate the number of steps in the case creation process.
- Select the fields to be displayed in each step.
- Enter the label for each step.

See "Configuring Display Templates for Components (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

See [Understanding Call Center Business Units](#)[Understanding Display Templates](#).

<b>Employee</b>	This read-only field displays the name of the employee who entered the case.
<b>Contact Details</b>	This read-only field displays the contact's primary contact method.
<b>Edit Contact Details</b>	Click this link to change the contact person specified in the Customer field or the Employee field.
<b>Business Unit</b>	<p>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.</p> <hr/> <p><b>Note:</b> If the user creates a case using a Business Unit that is different from the default self-service business unit established on the User Preferences - Call Center page, the system will update the user's default self-service business unit value with the newly selected value.</p> <hr/>
<b>Case Type</b>	Select the type of case you are adding.
<b>Product Group</b>	<p>Select the product group associated with the case you are adding.</p> <p>The system filters the values for product and installed product to only display the products and installed products contained within the specified product group.</p>
<b>Product</b>	<p>Select the product associated with the case you are adding.</p> <p>PeopleSoft Support and PeopleSoft HelpDesk derive the list of products differently:</p> <ul style="list-style-type: none"> <li>• 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.</li> </ul>

- In PeopleSoft HelpDesk and Service Center for Higher Education applications, the field prompts against all product descriptions.

### **View Product Hierarchy**

Click this link to go to the Installed Product Hierarchy page where you can search for installed products by product ID, product name, site name, and installed status.

### **Problem Type**

Select the problem type associated with the case you are adding.

Problem types are defined by product. This gives you an additional level of categorization for the problem. Because problem type is a child of Product, the Problem Type field on the Case page derives its values from product. If the Problem Type field is visible, be sure that the descriptions of your product competencies make sense to a self-service user who is selecting a problem type. Valid problem types depend on the product that the user selects.

### **Serial Number and Asset Tag**

The serial number appears in PeopleSoft Support and PeopleSoft Service Center for Higher Education. The asset tag appears in PeopleSoft IT Service Center and PeopleSoft Campus Service Center. Both fields prompt against the user's installed products. Valid values are limited based on the product that the user selects. Blank values might appear if the user has installed products that do not have serial numbers or asset tags.

### **Category, Specialty Type, Detail, Priority, Urgency, Severity, Summary, and Details**

Select or enter information in these fields to describe the type of problem you are having.

## **Direct Report Page or Look Up Employee Page**

Use the Direct Report page or Look Up Employee page (RC\_CASE\_HD\_SS\_DIRR) to look up and select an employee for whom you are adding a case.

The Add Case for Direct Report link is only available for PeopleSoft HR Service Center and the Add Case for Someone Else link is only available for PeopleSoft IT Service Center..

## Navigation

- Click the Add Case for Direct Report link on the Create Case page.
- Click the Add Case for Someone Else link on the Create Case page.

### Image: Direct Report page

This example illustrates the fields and controls on the Direct Report page.

Direct Report

Direct Reports

Select a person Personalize Find View All 1-7 of 7 First Last

Name	Employee ID
Marie Kuhns	KCD006
Claudia Salinger	KUD001
Todd MacPhee	KUD002
George DeAngelis	KUD003
Melissa Rosenberg	KUD004
Carmella Jackson	KUD005
Christian Nevell	KUD006

Cancel

In the Lookup Employee page, enter your search criteria in the fields at the top of the page and then click Look Up. Click the name of the employee for whom you are reporting a case. The system returns to the Create Case page.

In the Direct Report page, select the Name link for the person you want to create the case for. The name appears in the Create Case for field in the Create Case page.

---

**Note:** This page is part of the HelpDesk for Human Resources reported-by feature. The system displays this page, when you click the Add Case for Direct Report or Add Case for Someone Else link. PeopleSoft enables this link for HelpDesk for Human Resources customers when you first install the application. This field is used to report cases for your direct reports. If you have properly set up the integration between HCM and CRM, then the system retrieves the direct report details directly from the PeopleSoft HCM database.

---

## Edit Contact Information Page

Use the Edit Contact Information page (RC\_CASE\_HD\_SS\_CNTC) to update contact information for the employee that is the contact on the case.

## Navigation

Click the Edit Contact Details link on the Create Case page.

### Image: Edit Contact Information page

This example illustrates the fields and controls on the Edit Contact Information page.

**Edit Contact Information**

**Current Contact Information**

**Contact** Justin Larson

**Contact Type** Phone

**Contact Details** [Change Contact Information](#)

**New Contact Information**

**\*New Contact** Justin Larson [Select Contact](#) [Clear Contact](#)

**\*New Contact Method** Phone

**\*New Contact Information** [Change Contact Information](#)

[Save](#) [Cancel](#)

\* Required Field

Use the fields in the New Contact Information section to change contact information for the case on which you are currently working. To add another contact click the Select Contact link. To erase the contact that is displayed, click the Clear Contact link. Click Save when you are finished. The system returns you to the Create Case page.

## Managing Existing Self-Service Application Cases

This section discusses how to:

- Search for cases.
- Manage cases.
- View problem descriptions.
- View case notes.
- Enter a new case note.
- Enter the reason for closing a case.
- Enter the reason for reopening a case.
- Change contact information.

**Note:** You can display a group box for billing information by selecting this option on the display template. This section is delivered hidden.

## Pages Used to Manage Cases

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Find Cases	RC_CASE_SW_SS_SRCH RC_CASE_HD_SS_SRCH	<ul style="list-style-type: none"> <li>On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the Find Cases link on the Quick Links or My Recent Cases pagelet.</li> <li>Employee Self Service, Help Desk, Find Cases</li> <li>Employee Self Service, HR Help Desk, Find Cases</li> <li>Customer Care, Find Cases</li> <li>Service Center, Find Cases</li> </ul>	Search for cases to view more details.
Case <ID> - Case Information	RC_CASE_SW_SS RC_CASE_HD_SS	<ul style="list-style-type: none"> <li>On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click a Link Case link on the My Recent Cases pagelet.</li> <li>Select a case from the list of search results on the Find Cases page.</li> </ul>	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.
Case <ID> - Notes and Attachments	RC_CASE_SW_SS_NDTL RC_CASE_HD_SS_NDTL	On the Case <ID> page, click the Notes and Attachments tab.	View case notes and attachments.
Add Note and Attachment	RC_CASE_SW_SS_NADD RC_CASE_HD_SS_NADD	On the Case <ID> - Notes and Attachments page, click the Add Note or Attachment button.	Enter a new case note and attachment.  You must save the case to save the note.
Case <ID> - Interested Parties	RC_CASE_SW_SS_INT RC_CASE_HD_SS_INT	On the Case <ID> page, click the Interested Parties tab.	View interested parties added by the user or by an agent. The tab also displays the count of the number of interested parties on the case.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Reason for Closing the Case	RC_CASE_SW_SS_CLSE RC_CASE_HD_SS_CLSE	On Case <ID> page, click the Close Case button. This button is available only if the business unit rules permit self-service users to re-open cases.	Select or enter the reason for closing an open case.
Reason for Reopening the Case	RC_CASE_SW_SS_ROMN RC_CASE_HD_SS_ROMN	On the Case <ID> page, click the Reopen this Case button. This button is available only if the business unit rules permit self-service users to close cases.	Select or enter the reason for reopening a closed case.  Reopening a case causes all successful resolutions to be marked as failed solutions.
Manage Case - Edit Contact Information	RC_CASE_SW_SS_CONTC RC_CASE_SW_SS_CNCTC RC_CASE_HD_SS_CNCTC RC_CASE_HE_SS_CSMR	Click the Edit Contact Details or Change Contact Information link on the Create Case page or the Case <ID> page.	Change the contact information for a case.

## Find Cases Page


Use the Find Cases page (RC\_CASE\_SW\_SS\_SRCH or RC\_CASE\_HD\_SS\_SRCH) to search for cases to view in more detail.

### Navigation

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the Find Cases link on the Quick Links or My Recent Cases pagelet.
- Employee Self Service, Help Desk, Find Cases
- Employee Self Service, HR Help Desk, Find Cases
- Customer Care, Find Cases
- Service Center, Find Cases

### Image: Find Cases page

This example illustrates the fields and controls on the Find Cases page.

Find Cases  HR Service Center

Choose a predefined search criteria and click search.

**Search Criteria**

Employee Jorge Menendez

\*Predefined Search All my cases

Search Advanced Search

\* Required Field

## Related Links

[Updating Search Descriptions](#)

## Case <ID> - Case Information Page

Use the Case <ID> - Case Information page (RC\_CASE\_SW\_SS or RC\_CASE\_HD\_SS) to view case information.

This page is also the starting point for several other processes: adding notes, changing contact information, requesting that an agent contact the user, searching for new solutions, and viewing solutions that are already under consideration for this case.

### Navigation

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click a Link Case link on the My Recent Cases pagelet.
- Select a case from the list of search results on the Find Cases page.

### Image: Case <ID> - Case Information page

This example illustrates the fields and controls on the Case <ID> - Case Information page.

**Case 220578** Campus Service Center

[Contact me regarding this case](#) [Close this case](#)

[Case Information](#) [Solutions Search](#) [Solutions Considered \(0\)](#) [Notes and Attachments \(0\)](#) [Interested Parties \(0\)](#)

**Case Summary**

**Summary** Open Enrollment question

**Description** When will enrollment start for the Law school

**Status** Open - Research

**Assigned To** Amanda Newman

**Priority** Urgent

**Contact Information**

**Customer** Joseph Ratto

**Contact Type** Phone

**Edit Contact Details** 001-9252450614 [Edit Contact Details](#)

**Other Case Details**

**Case Type** Enrollment

**Category** Enrollment

**Detail** Online Course Enroll

**Impact**

**Urgency** Medium

**Severity**

## Case <ID> - Notes and Attachments Page

Use the Case <ID> - Notes and Attachments page (RC\_CASE\_SW\_SS\_NDTL or RC\_CASE\_HD\_SS\_NDTL) to view case notes and attachments.

## Navigation

On the Case <ID> page, click the Notes and Attachments tab.

**Image: Case <ID> - Notes and Attachments page**

This example illustrates the fields and controls on the Case <ID> - Notes and Attachments page.

Case 220582

 Campus Service Center

 Contact me regarding this case

 Close this case

Case Information

Solutions Search

Solutions Considered (0)

Notes and Attachments (0)

Interested Parties (0)

Notes and Attachments

There are no notes on the case at this time.

Add Note or Attachment

## Add Note and Attachment Page

Use the Add Note and Attachment page (RC\_CASE\_SW\_SS\_NADD) to enter a new case note and attachment.

## Navigation

On the Case <ID> - Notes and Attachments page, click the Add Note or Attachment button.

**Image: Add Note and Attachment page**

This example illustrates the fields and controls on the Add Note and Attachment page.

Add Note and Attachment

Summary

Details

Format

Font

Size

B

I

U

abc

Add Attachment

SaveCancel

Use the fields on this page to add notes and attachments. Click the Add Attachment button to add files from your computer to the case. Click Save when you are finished.

## Related Links

"Adding Attachments to Notes (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"



## Case <ID> - Interested Parties


Use the Case <ID> - Interested Parties page (RC\_CASE\_SW\_SS\_INT and RC\_CASE\_HD\_SS\_INT) to view interested parties added by the user or by an agent. The tab also displays the count of the number of interested parties on the case.



### Navigation

On the Case <ID> page, click the Interested Parties tab.

### Image: Case <ID> - Interested Parties page

This example illustrates the fields and controls on the Case <ID> - Interested Parties page.

Case 220598  HR Service Center

 Contact me regarding this case  Close this case

Case Information | Solutions Search | Solutions Considered (0) | Notes and Attachments (0) | Interested Parties (0)

**Interested Parties**

There are no interested parties on the case at this time.

[Add Interested Party](#)

For HR Help Desk, the Case <ID> - Interested Parties page is hidden and can be displayed for self-service users by the Administrator.

### Add Interested Party

Click the Add Interested Party button to display the Add Interested Party page. Select a Name and Reason Code, and click the Save button to add an interested party to the case.

## Reason for Closing the Case Page

Use the Reason for Closing the Case page (RC\_CASE\_SW\_SS\_CLSE or RC\_CASE\_HD\_SS\_CLSE) to select or enter the reason for closing an open case.

## Navigation

On the Case <ID> page, click the Close this Case button. This button is available only if the business unit rules permit self-service users to close cases.

### Image: Reason for Closing the Case page

This example illustrates the fields and controls on the Reason for Closing the Case page.

The screenshot shows a web form titled "Reason for Closing the Case." with a close button in the top right corner. The form has two main sections. The first section, "Predefined Reasons", is selected with a radio button and contains a "Reason" drop-down menu. The second section, "Other Reason", is unselected and contains a "Details" text area with a small icon in the top right corner. At the bottom of the form are two buttons: "Save" and "Cancel".

#### Predefined Reasons and Reason

Select the Predefined Reasons option and then select one of the predefined reasons from the Reason drop-down list box.

#### Other Reason and Details

Select this option and enter the reason in the Details field if you want to enter a free-form text reason.

#### Save

When the user clicks this button, the system changes the case status to the value that is specified in the Closed Case Status field on the Case Defaults page.

See [Case Defaults Page](#).

If a user selects a predefined reason from the Reason field, the system resolves the case by using the solution that is identified on the Reason and Solution Link page.

If no solution is linked to the selected reason code, the system creates one (using the solution type *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.

## Related Links

[Associating Solutions with Reasons for Closing Cases](#)

[Setting Up Reason Codes](#)

[Case Defaults Page](#)

## Reason for Reopening the Case Page

Use the Reason for Reopening the Case page (RC\_CASE\_SW\_SS\_ROPN) to select or enter the reason for reopening a closed case.

Reopening a case causes all successful resolutions to be marked as failed solutions.

### Navigation

On the Case <ID> page, click the Reopen this Case button. This button is available only if the business unit rules permit self-service users to close cases.

### Image: Reason for Reopening the Case page

This example illustrates the fields and controls on the Reason for Reopening the Case page.

#### Predefined Reasons and Reason

Select the Predefined Reasons option and then select one of the predefined reasons from the Reason drop-down list box. The available reasons include: *Problem Re-occurred*, and *Solution Failed*.

#### Other Reason and Details

Select this option and enter the reason in the Details field if you want to enter a free-form text reason.

#### Save

When the user clicks this button, the system changes the case status to the value that is specified in the Reopened Case Status field on the Case Defaults page. The reason (either predefined or free-form text) becomes a resolution note.

### Related Links

[Associating Solutions with Reasons for Closing Cases](#)

[Setting Up Reason Codes](#)

[Case Defaults Page](#)

## Manage Case - Edit Contact Information Page

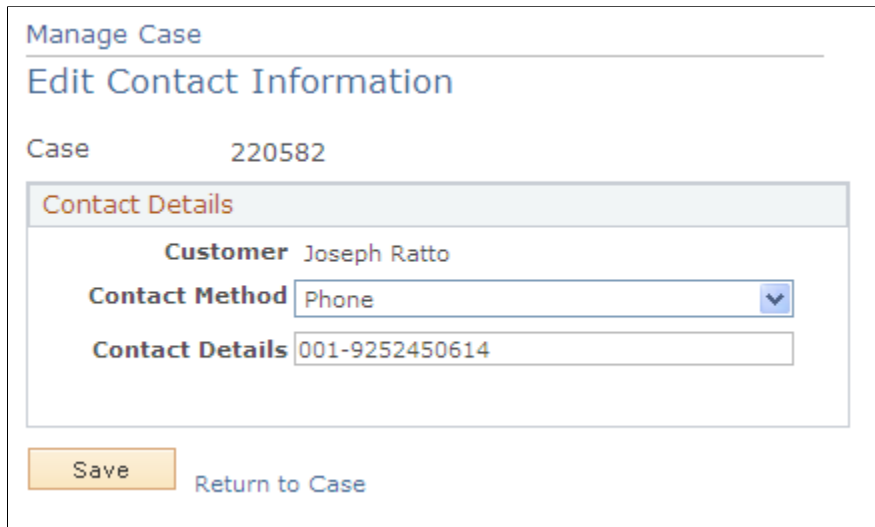
Use the Manage Case - Edit Contact Information page (RC\_CASE\_SW\_SS\_CONT) to change the contact information for a case.

### Navigation

Click the Edit Contact Details Change Contact Information button link on the Create Case page or the Case <ID> page.

### Image: Manage Case - Edit Contact Information

This example illustrates the fields and controls on the Manage Case - Edit Contact Information.



The screenshot displays the 'Manage Case - Edit Contact Information' page. At the top, the page title is 'Manage Case' followed by 'Edit Contact Information'. Below this, the 'Case' number is '220582'. A section titled 'Contact Details' contains the following information: 'Customer' is 'Joseph Ratto', 'Contact Method' is 'Phone' (selected from a dropdown menu), and 'Contact Details' is '001-9252450614'. At the bottom of the form, there is a 'Save' button and a 'Return to Case' link.

The appearance of this page varies slightly depending on whether the user is a company contact person (PeopleSoft Support), a consumer (PeopleSoft Support), or a worker (PeopleSoft HelpDesk).

You can change contact information when you are creating a new case or viewing an existing case.

On the Create Case page, the Change Contact Information button is available only until the case is submitted. After submitting the case, use the Manage Case - Edit Contact Information page to change the contact information.

---

## Searching for Solutions

This section discusses how to:

- Perform a basic solution search.
- Perform a frequently used solution search.
- Search for solutions using field-specific search criteria.
- Use the Solution Summary page.

## Pages Used to Search for Solutions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Search or Solutions Search	RC_SS_SOLNSRCH RC_CASE_HD_SS_SOLN	<ul style="list-style-type: none"> <li>On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the Search icon on the Search Here for Answers pagelet.</li> <li>Click the Solutions Search tab in the Case &lt;ID&gt; page.</li> <li>Employee Self Service, Help Desk, Search Solutions</li> <li>Employee Self Service, HR Help Desk, Search Solutions</li> <li>Customer Care, Search Solutions</li> <li>Service Center, Search Solutions</li> </ul>	Perform a basic solution search.
Case <ID> - Solutions Considered	RC_CASE_SW_SS_SOLC RC_CASE_HD_SS_SOLC	Click the Solutions Considered tab on the Case <ID> page.	View solutions viewed by the self service user or solutions recommended for the case by an agent.
Solution Details or Solution Considered Details	RC_SS_SOLNDTLS RC_CASE_SS_RSL_2ND	<ul style="list-style-type: none"> <li>On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click a Solution link on the Top Solutions pagelet</li> <li>Click a Solution Summary link in the Case &lt;ID&gt; - Solutions Considered tab.</li> </ul>	View a solution and indicate whether the solution solved a problem.

## Search or Solution Search Page

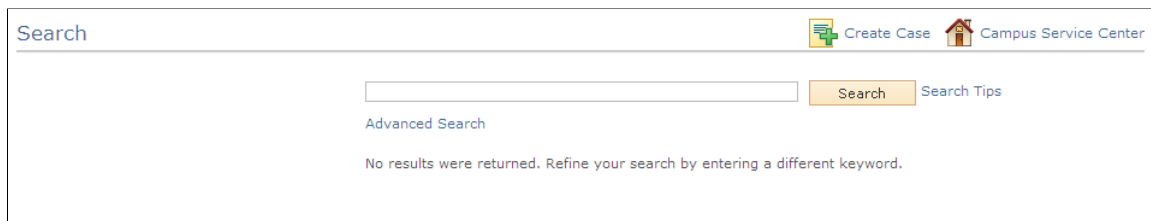
Use the Search (RC\_SS\_SOLNSRCH) or Solutions Search page (RC\_CASE\_HD\_SS\_SOLN) to perform a basic solution search.

## Navigation

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the Search icon on the Search Here for Answers pagelet.
- Click the Solutions Search tab in the Case <ID> page.
- Employee Self Service, Help Desk, Search Solutions
- Employee Self Service, HR Help Desk, Search Solutions
- Customer Care, Search Solutions
- Service Center, Search Solutions

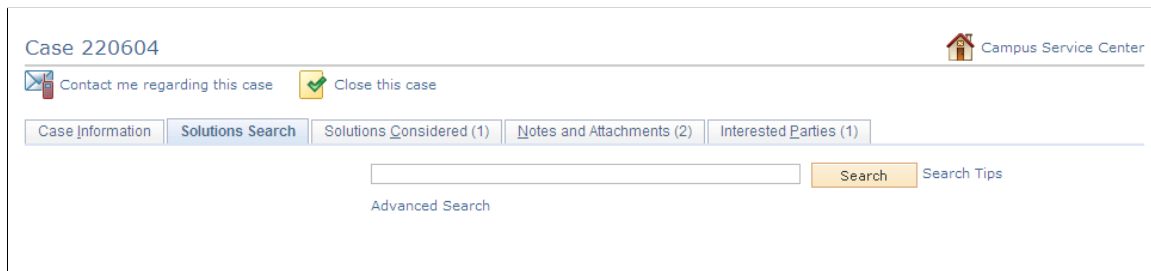
### Image: Search page

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



### Image: Case <ID> - Solutions Search page

This example illustrates the fields and controls on the Case <ID> - Solutions Search page.



#### Search Text

Solution Advisor uses PeopleSoft Search to perform keyword search. It takes the keywords entered in this field and search them against the index file that's generated for solutions.

#### Advanced Search

Click this link to access the Search Solution page for advanced searches, which accepts field-specific search criteria.

#### Search

Click this button to perform a search. The search results appear at the bottom of the page.

#### Create Case

This link appears when you are searching for solutions outside the context of a case.

#### <Self-Service Home Page> Service Center

This link appears when you are searching for solutions within the context of a case.

## Case <ID> - Solutions Considered Page

Use the Case <ID> - Solutions Considered page (RC\_CASE\_SW\_SS\_SOLC or RC\_CASE\_HD\_SS\_SOLC) to view solutions viewed by the self service user or solutions recommended for the case by an agent.

### Navigation

Click the Solutions Considered tab on the Case <ID> page.

### Image: Case <ID> - Solutions Considered page

This example illustrates the fields and controls on the Case <ID> - Solutions Considered page.

Case 220604 Campus Service Center

Contact me regarding this case Close this case

Case Information | Solutions Search | **Solutions Considered (1)** | Notes and Attachments (2) | Interested Parties (1)

**Solutions Considered**

Description	Status	Did this solve your Problem?
Case Resolved Case Resolved	Failed Resolution	Yes No

To search for frequently used solutions, first select a product by clicking the Choose a Product link.

---

**Note:** Self-service users can only search on active solutions. Solutions that are categorized as either canned or adhoc do not appear in searches on the Case <ID> - Solutions Considered page for both agents and self-service users.

---

## Solution Details or Solution Considered Details Page

Use the Solution Details page (RC\_SS\_SOLNDTLS) or the Solution Considered Details page (RC\_CASE\_SS\_RSL\_2ND) to view a solution and indicate whether the solution solved a problem.

## Navigation

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click a Solution link on the Top Solutions pagelet.
- Click a Solution Summary link in the Case <ID> - Solutions Considered tab.

## Image: Search Solution - Solution Summary page

This example illustrates the fields and controls on the Search Solution - Solution Summary page.

**Manage Case - Search Solution**

**Solution Summary**

**Solution Detail**

**Solution ID** 67  
**Summary** Steps to fix ITN Notebook printing problems  
**Symptoms** Unable to print from ITN Notebook  
**Details** \* Check that you are using a proper cable or cable adapter and that the printer is turned on. \* Check for paper in the printer or other printer errors. \* Make sure that the printer cable is secure at both ends.

**Did this solve your Problem?**

[Return to Case](#)

**Related Solutions**

Relationship	Solution ID	Summary
Similar	72	<a href="#">Testing the Self-test verification for ITN Printers</a>

**Metrics**

**Usage Count** 0      **Solved Count** 0  
**Datetime Added** 04/03/2001 9:33AM PDT      **Last Modified** 07/17/2009 10:55AM PDT

Use this page to review the details of a solution and indicate if the solution solved your problem.

If a solution has related solutions, then the system lists the related solutions under Attachments on the Solution Summary Page. By Clicking the Related Solution the user can view the Related Solution Summary.

## Accessing FAQs

This section discusses how to:

- Select FAQs.
- Review solutions.



## Pages Used to Access FAQs

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Frequently Asked Question	RC_FAQ_DETAILS_SS	<ul style="list-style-type: none"> <li>On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click an FAQ or the View All link on the FAQ pagelet.</li> <li>Employee Self Service, Help Desk, FAQ</li> <li>Employee Self Service, HR Help Desk, FAQ</li> <li>Customer Care, FAQ</li> <li>Service Center, FAQ</li> </ul>	View a list of frequently asked questions and the corresponding details.

## Frequently Asked Questions Page

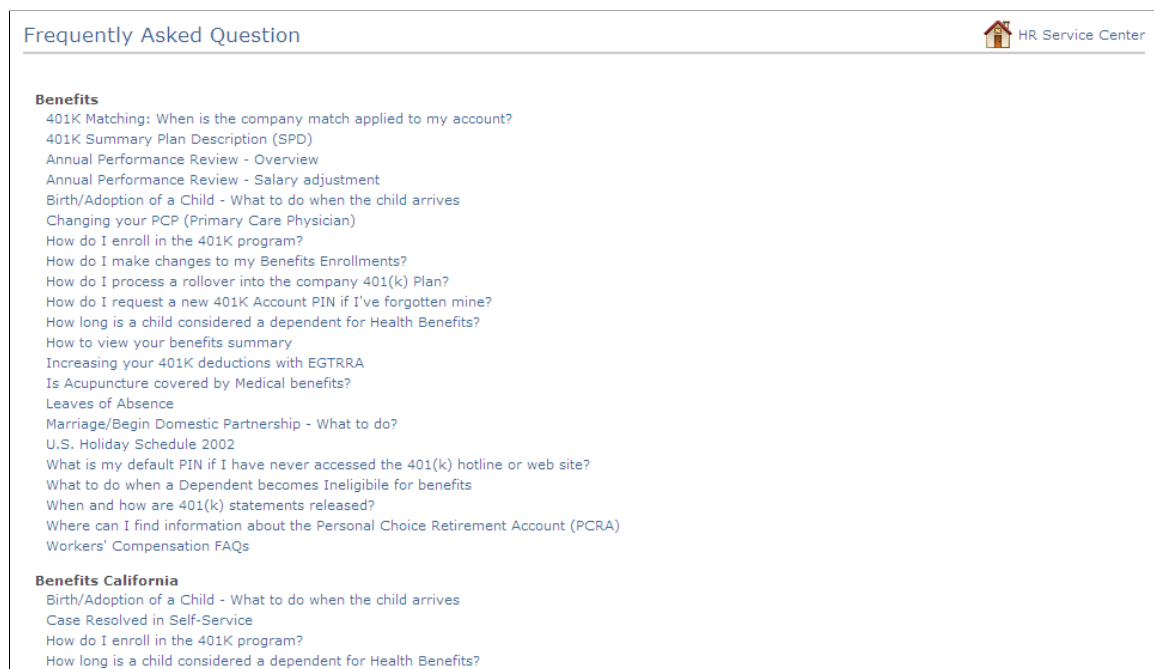
Use the Frequently Asked Questions page (RBT\_FAQ\_SOL\_SS) to view a list of frequently asked questions and the corresponding details.

## Navigation

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click an FAQ or the View All link on the FAQ pagelet.
- Employee Self Service, Help Desk, FAQ
- Employee Self Service, HR Help Desk, FAQ
- Customer Care, FAQ
- Service Center, FAQ

## Image: Frequently Asked Question page

This example illustrates the fields and controls on the Frequently Asked Question page.



## Selecting and Running Troubleshooting Guides

This section discusses how to:

- Use troubleshooting guides.
- Run scripts in self-service.

## Pages Used to Select and Run Troubleshooting Guides

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Troubleshooting Guide	RBT_TGUIDE_SS	<ul style="list-style-type: none"> <li>On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the Troubleshooting Guide link on the Quick Links pagelet.</li> <li>Employee Self Service, Help Desk, Troubleshooting Guide</li> <li>Employee Self Service, HR Help Desk, Troubleshooting Guide</li> <li>Customer Care, Troubleshooting Guide</li> <li>Service Center, Troubleshooting Guide</li> </ul>	Select a troubleshooting guide.
Execute Script	RC_BS_SELF_CONFIG	On the Troubleshooting Guide page, select a solution library and script name, and click the Launch button.	Run a troubleshooting guide script.

### Troubleshooting Guide Page

Use the Troubleshooting Guide page (RBT\_TGUIDE\_SS) to select a troubleshooting guide.

## Navigation

- On the HR Service Center, IT Service Center, Customer Service Center, or Campus Service Center home page, click the Troubleshooting Guide link on the Quick Links pagelet.
- Employee Self Service, Help Desk, Troubleshooting Guide
- Employee Self Service, HR Help Desk, Troubleshooting Guide
- Customer Care, Troubleshooting Guide
- Service Center, Troubleshooting Guide

## Image: Troubleshooting Guide page

This example illustrates the fields and controls on the Troubleshooting Guide page.

HelpDesk

### Troubleshooting Guide

This Troubleshooting Guide will identify your problem and offer the most likely solution.  
Select a topic from the drop-down menu.

Topic

\*Business Unit

\*Guide

\*Script Name

Launch

[Return to HelpDesk](#)

\* Required Field

### Business Unit

This field may have a different label, depending on how you configure self-service. If you do not show a business unit on the self-service pages, the user must have a default self-service business unit established on the User Preferences - Call Center page.

### Guide

Select from a list of solution libraries that you set up in the Troubleshooting Guide setup page. Each library is associated with a single script.

### Script Name

Select the script name populated for the solution library.

### Launch

Click to display the Execute Script page and run the script that is associated with the selected library.

## Execute Script Page

Use the Execute Script page (RC\_BS\_SELF\_CONFIG) to run a troubleshooting guide script.

## Navigation

On the Troubleshooting Guide page, select a solution library and script name, and click the Launch button.

### Image: Execute Script page

This example illustrates the fields and controls on the Execute Script page.

**Execute Script** [View Variables](#) [View Comments](#) [View Responses](#)

**Benefits Troubleshooting-SS**

Hello Jorge Menendez. Welcome to the Troubleshooting Guide! What type of Benefits question do you have?

- ☒ Benefits Change
- ☐ Benefits Related
- ☐ Disability
- ☐ FSA Plan
- ☐ Health Insurance
- ☐ Leave Plans
- ☐ Life Insurance
- ☐ Pension
- ☐ Savings Plans
- ☐ Vacation Buy/Sell
- ☐ Other

**Comment**

[Finish](#) [Save](#) [Next](#)

See "Running Scripts on Self-Service Pages (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".



# Integrating a Case with Third-Party Systems

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## Understanding the Case EIP

The Case EIP integrates the PeopleSoft CRM case with third-party systems. The Case EIP is developed generically for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, and all PeopleSoft CRM verticals. The Case EIP enables you to:

- Create a case from a third-party system.
- Update a case from a third-party system.
- Request case information from a third-party system.

This is a guide for technical users, installers, system administrators, and programmers who implement, maintain, or develop Case EIP.

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## Defining Case EIP Functionality

This section discusses:

- Assumptions about the case EIP.
- Case EIP functionality.
- Delivered EIPs.
- Technical process flows.
- Error handling.

## Assumptions About the Case EIP

When considering the Case EIP, you must be aware of the following:

- To create a support case, these customer information fields must be provided: Customer BO ID, Customer Role Type ID, Display Template Family CodeID, and Contact BO ID.

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**Note:** The Display Template Family Code is required for creating a case, not for updating it. If a default Display Template Family Code is specified in the user default setup, the third-party vendor does not have to provide it; case creation will occur. If no business unit or display template is provided in the incoming request message and if the user does not have defaults defined, the system sends an error message back to the third-party vendor.

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- The third-party system needs to send the appropriate business unit, vertical, and market values in the request, unless these values can be provided by default from user reference.
- The Case EIP is developed using PeopleTools Integration Broker technology.
- The Case EIP does not use bulk loading.

The Case EIP feature is intended to automatically create and update cases from third-party systems; it is not for data-conversion purposes.

- The Case EIP and related case component interfaces are meant for the agent-facing case, not for self-service.
- When creating a note for a case using the Case EIP, the system leaves the customer, contact, and employee information blank.

The Case EIP cannot create a note for a different customer, contact, or employee.

- A case may use attributes.

An attribute can be of any data type (string, number, date, and so on). The system stores different data types in the matching data type field in the request message. It is the responsibility of the third-party system to provide the correct data format for attributes when creating attributes for a case.

- The case component can be configured to enable or disable functionality and to hide or unhide fields on the Case page.

The case component is rendered based on the display template. When customers send a request to create a case, it is assumed that they will not send information that has been disabled or hidden. The Case EIP will not do additional validation that is based on configuration settings.

See "Understanding Display Templates (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

## Case EIP Functionality

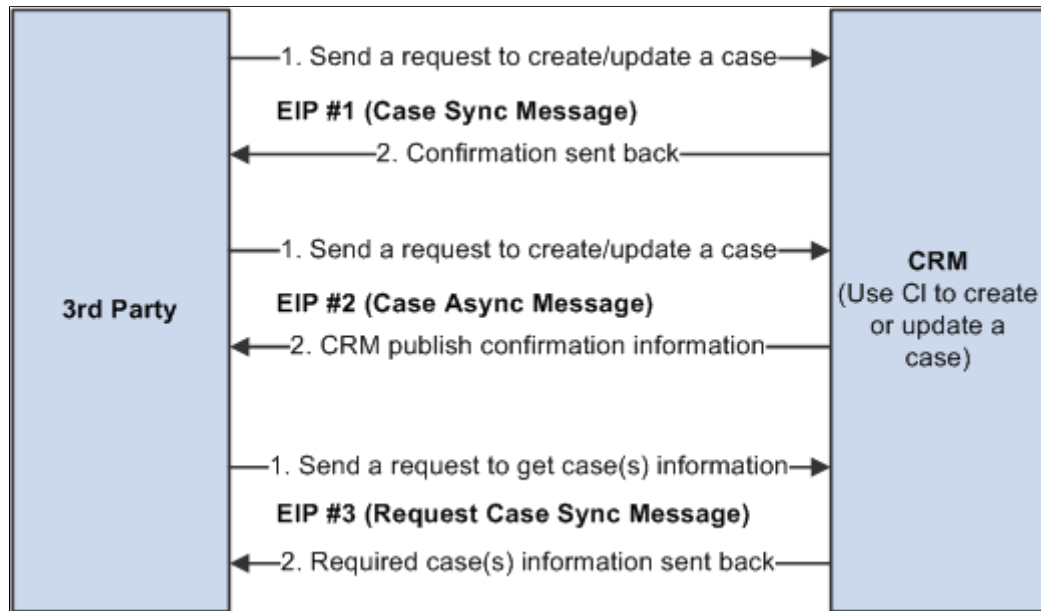
The Case EIP provides a bi-directional EIP in PeopleSoft CRM for PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Service Center for Higher Education, and all PeopleSoft CRM verticals.



It provides a transactional framework that enables your call center to send and receive case information to and from any third-party applications.

### Image: Case EIP process flow

This diagram illustrates the Case EIP process flow.



## Delivered EIPs

The following EIPs, as shown in the previous diagram, are provided:

- EIP #1 - Case Synchronous EIP.
- EIP #2 - Case Asynchronous EIP.
- EIP #3 - Request Case Information EIP (Synchronous).

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**Note:** If the request contains a case ID, a new case is not created. The existing PeopleSoft CRM case is updated with the pertinent information supplied in the request. If the case ID passed in is invalid, no case is updated and an error message is sent back.

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**Warning!** When you create a case, make sure the value of the CASE\_ID field in the request message is empty or 0. When you update a case, make sure the CASE\_ID value is a valid value that exists in the CRM RC\_CASE table.

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### Case Synchronous EIP

The third-party application sends a request to CRM to create or update a case and waits for the response. Once the system processes the case in CRM, confirmation information is sent back to the third-party application.

This EIP has one web service (RC\_CASE\_REQUEST\_SYNC), which contains one service operation (RC\_CASE\_REQUEST\_SYNC) with two messages:

- `RC_CASE_REQUEST_SYNC` - Inbound synchronous request message.
- `RC_CASE_RESPONSE_SYNC` - Outbound synchronous response message.

The processing details are as follows: when a request message is received, the on request event calls an appropriate case component interface (CI) to process information from the request message and saves the information into the Case component. The system sends a response message back to the third-party system with confirmation information. The response message may contain information that CRM populates, such as case ID, assigned provider group, and agent.

Since the third-party system is waiting for the response from CRM, the system processes only one case per message.

### **Case Asynchronous EIP**

The third-party system sends a request to create or update a case, and it is not waiting for the response. Once the case is created or updated, CRM publishes confirmation information back to the third-party.

This EIP has two web services:

- `RC_CASE_REQUEST_ASYNC`, which contains one service operation (`RC_CASE_REQUEST_ASYNC`) with the message `RC_CASE_REQUEST_ASYNC` (inbound asynchronous message).
- `RC_CASE_RESPONSE_ASYNC` - which contains one service operation (`RC_CASE_RESPONSE_ASYNC`) with the message `RC_CASE_RESPONSE_ASYNC` (outbound asynchronous message).

The processing details are as follows: when CRM receives the request, it calls the appropriate case CI to create or update a case and then publishes case information back to the third party.

Since the third-party system is not waiting for the response from CRM, the request message may include information from multiple cases in one message. CRM processes them one by one. The system issues a commit at the end of each successful case.

### **Request Case Information EIP (Synchronous)**

The third-party system sends a request to CRM to find case information. The request may contain multiple cases. CRM processes the request and sends the information for the case or cases back to the third-party system.

This EIP has one web service (`RC_CASE_INQUIRY_REQ_SYNC`), which contains one service operation (`RC_CASE_INQUIRY_REQ_SYNC`) with two messages:

- `RC_CASE_INQUIRY_REQ_SYNC` - Inbound synchronous request message.
- `RC_CASE_INQUIRY_RESP_SYNC` - Outbound synchronous response message.

The processing details are as follows: the request message may have one or more Case IDs, the on request event is triggered, and the CRM system processes the rowset of the message to populate case information, one by one. The system uses a direct SQL query instead of a CI.

## Technical Process Flows

The logic of EIP #1 (Case Synchronous EIP) and #2 (Case Asynchronous EIP) are the same except for the way in which they are initiated.

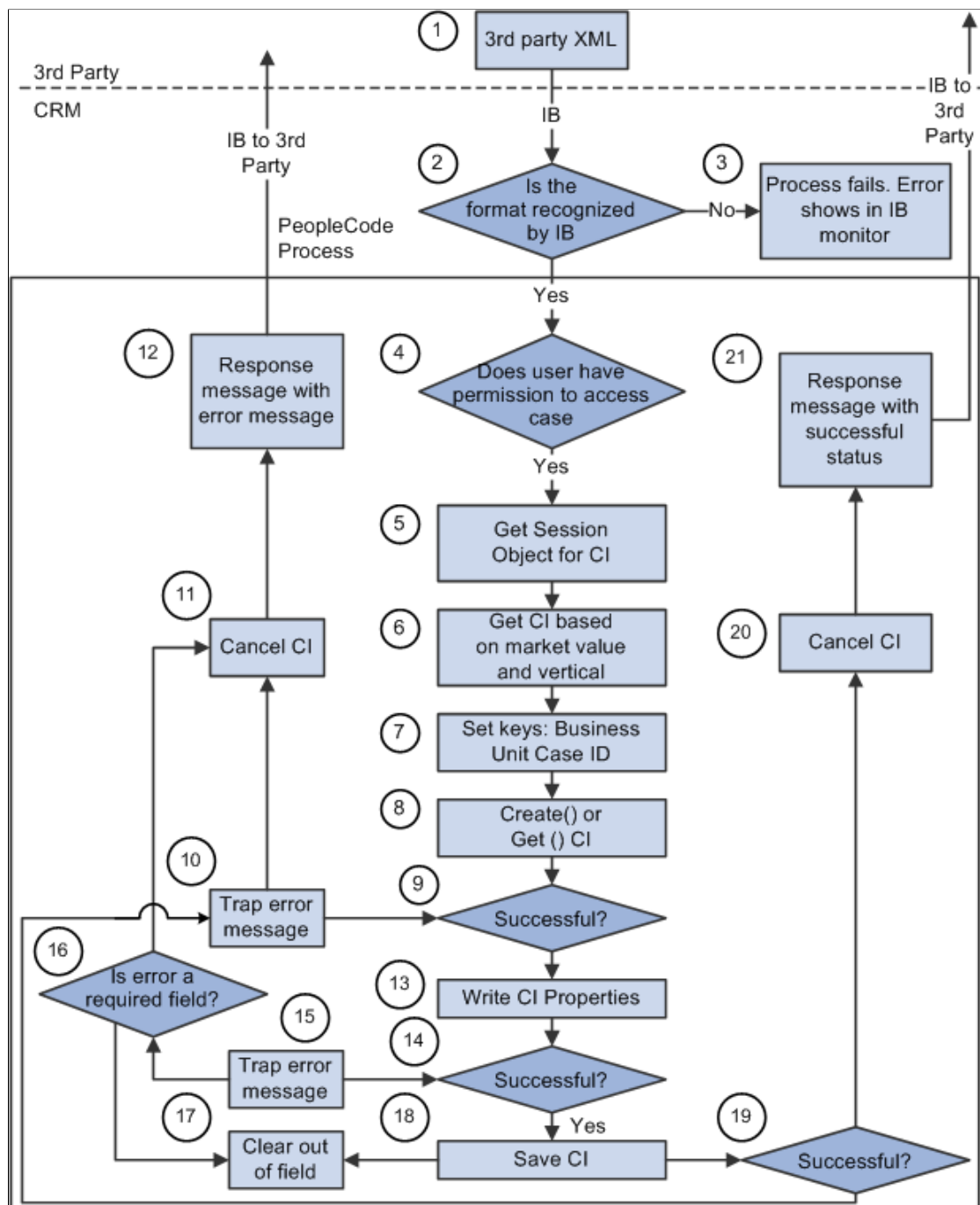
EIP #1 is triggered from an OnRequest event. The system generates a sync response message and returns it to the third-party system.

EIP #2 is triggered from an OnNotify event. The system publishes a response message for the third-party application.

EIP #1 and #2 share the same PeopleCode function, ProcessCaseEIP is defined in the FUNCLIB RC EIP.CASE EIP field formula.

**Image: Process flow for EIP #1 and EIP #2**

The following diagram illustrates the technical process flow for both EIP #1 and EIP #2.



This list indicates where you are in the process flow diagram:

1. The third-party sends an XML request to CRM by way of the integration gateway by using a web service.

3. If integration broker (IB) does not recognize the format, the message is trapped in integration broker.

The process fails (this is standard integration broker functionality).

See *PeopleTools: Integration Broker Service Operations Monitor*

See *PeopleTools: Integration Broker Testing Utilities and Tools*

4. OPRID, which is required, is used to validate whether the user has access to the requested case.

Once the user passes security checking, the system creates a case or updates it through integration broker. The integration broker user ID is used to create or update a case. This is the user ID that is used to start the application server.

5. If the user passes the security check, the system obtains a session for component interface processing.

6. When creating a case, BUSINESS\_UNIT is required.

The system automatically assigns the next new CASE\_ID. If BUSINESS\_UNIT is not supplied when creating a case, CRM uses the default business unit from user preferences. When updating a case, only CASE\_ID is required since it is a unique identifier.

7. Based on the Case ID value, the system decides whether to insert or update a case.

When no Case ID is provided, CRM creates a case by calling the *create()* method of CI. When the Case ID is provided, CRM checks whether the Case ID exists in CRM. If it exists, the case is updated by calling the *get()* method; otherwise, the system does not do any case processing. The system generates a response message with CASE\_EIP\_STATUS = 1 (failed) and CASE\_EIP\_ERROR\_MSG - *Update failed. Case 123 does not exist in CRM.* PeopleCode function *IsCaseExist* in FUNCLIB\_RC\_EIP. The CASE\_ID FieldFormula checks if the case exists.

8. If the create() or get() method fails, the system generates an error message in RC\_CASE\_EIP\_ERR for the response message.

The system cancels the CI to reset the instance (process 11), and sends the response message with the error message back to the third-party (process 12).

9. Once the create() or get() method passes successfully, CRM sets the CI properties as supplied in the request message.

When the third-party application sends a request to create a support case or a Higher Education case for a company contact or consumer, CRM requires customer and contact information.

For customer information, the third-party application can either provide CUST\_ID or BO\_ID\_CUST.

If BO\_ID\_CUST is provided, CRM uses it directly to create a case.

Conversely, if only CUST\_ID is provided, CRM uses the RD\_COMPANY table to derive BO\_ID\_CUST in order to create a case.

The function to get BO\_ID\_CUST is based on CUST\_ID is the PeopleCode Function *GetCustBObyID* in FUNCLIB\_RC\_EIP.CASE\_ID FieldFormula.

For contact information, the third-party application can either provide the PERSON\_ID or BO\_ID\_CONTACT.

When BO\_ID\_CONTACT is provided, CRM uses it directly; otherwise, contact PERSON\_ID is used to derive BO\_ID\_CONTACT from the RD\_PERSON table.

The function to get BO\_ID\_CONTACT is based on PERSON\_ID, the PeopleCode Function *GetPersonBObyID* in FUNCLIB\_RC\_EIP.CASE\_ID FieldFormula.

### **Considerations for HelpDesk or HelpDesk for Human Resources Cases, or for Service Center for Higher Education Case for Worker**

The third-party application must provide employee information when it sends a request to create a help desk case. To create a case, the third-party application must also supply the EMPLID, as CRM uses it to derive appropriate BO\_ID\_CUST with ROLE\_TYPE\_ID\_CUST.

BO\_ID\_CUST and ROLE\_TYPE\_ID\_CUST need to be populated internally for a case.

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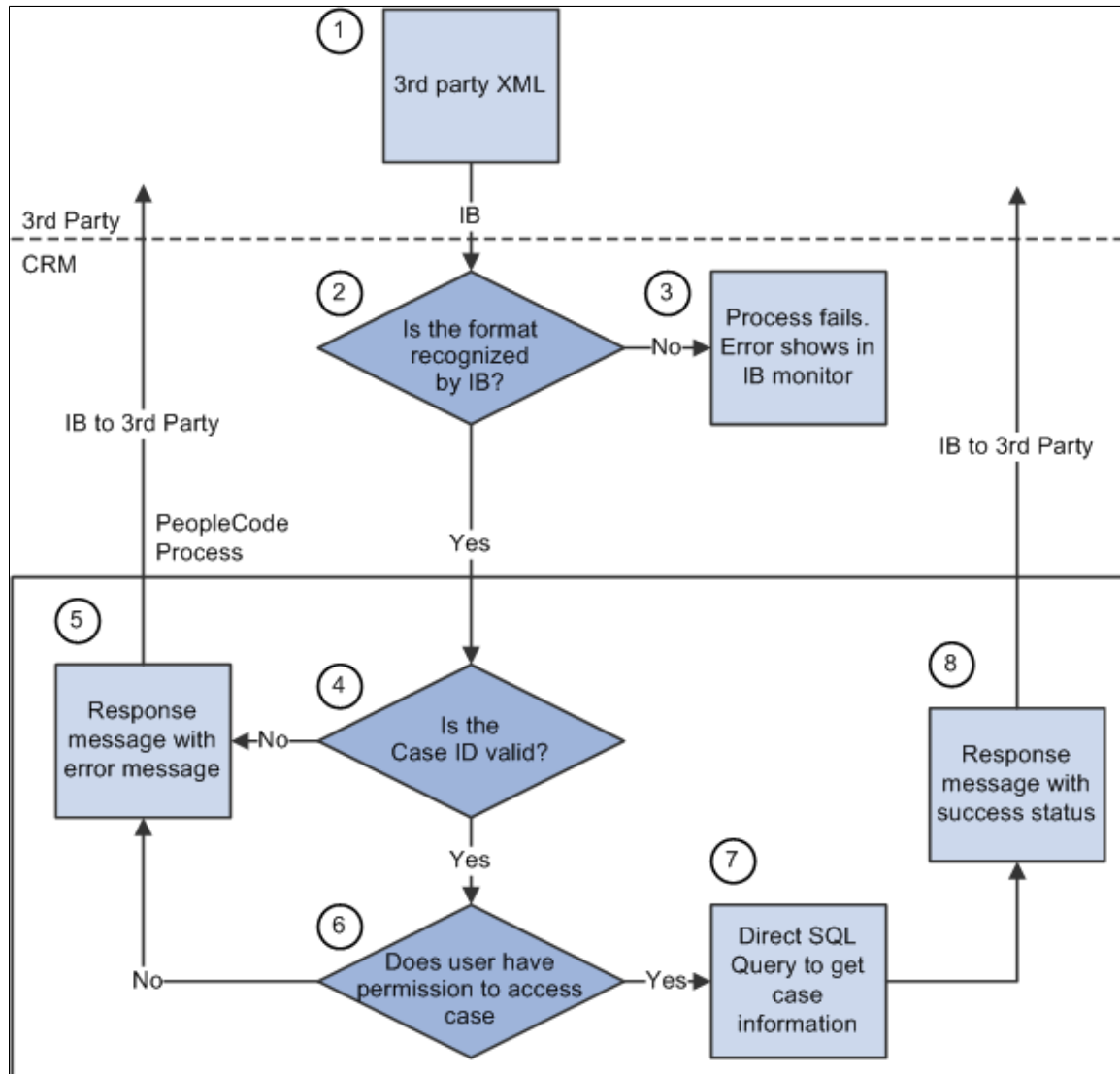
**Note:** Tip: When creating a support case for a customer, make sure BO\_ID\_CUST (or CUST\_ID), ROLE\_TYPE\_ID\_CUST, BO\_ID\_CONTACT (or CONTACT\_PERSON\_ID), ROLE\_TYPE\_ID\_CNTCT is provided. When creating a HelpDesk case for an employee, make sure the EMPLID is provided. The POI (person of interest) is supported for PeopleSoft HelpDesk for Human Resources cases only. Third-party vendors must pass a valid worker for creating an IT help desk case, and a valid worker or POI for creating a HelpDesk for Human Resources case. Higher Education cases support company contact, consumer, and worker. When creating a Higher Education case, provide either customer or employee information based on what type of case you want to create.

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15. If the setting of a CI property for a field fails, the system traps an error message in the &PSMessage object with information on which field caused the error.

**Image: Process flow for EIP #3** **Process Flow Diagram for EIP #3 process flows** **EIP #3**

The following diagram illustrates the technical process flow for EIP #3.



1. The third-party application sends an XML request to CRM by way of the integration gateway.

2. If the integration broker (IB) does not recognize the format, the request is trapped in integration broker.

The case process fails.

3. When a message is passed in from integration broker, the PeopleCode process begins.

The system checks if the case ID exists in PeopleSoft CRM. If the case does not exist in PeopleSoft CRM, the system sends back a response message with an error message (process 5).

4. If the case exists in CRM, PeopleSoft CRM checks if the user has access to the case component based on the market and vertical, and the system gathers market and vertical information.

If a user does not have access, a response message is sent back immediately with the access denied error message (process 5).

The function to check access permission is:

IsUserAuthorized in FUNCLIB\_RC\_EIP.CASE\_ID FieldFormula.

5. Once the user passes the security check, the system executes a direct SQL query to get all case related information and send it back to the third party (process 8).

## Error Handling

When a required field contains an invalid value in a request message, or the save event fails, the process fails. The system copies the request message over to response message, and the response message is sent back to the third party with an error message.

When a non-required field contains an invalid value, the system ignores that field and case processing continues. The system sends back a warning message.

Here are some tips:

- Always check fields CASE\_EIP\_STATUS and CASE\_EIP\_GEN\_MSG first in the response message.

When the status is 0 or 2, the response message contains case information that is stored in the PeopleSoft CRM system. When the status is 1 (that is, when the case has failed), nothing is saved in PeopleSoft CRM, and the response message contains a copy of the request information, not the case information stored in CRM. This functionality aids in error handling.

- When CASE\_EIP\_STATUS fails or a warning is issued, the system logs a detailed error or warning message in the rowset RC\_CASE\_EIP\_ERR of the response message.

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## Implementing Case EIP

This section discusses:

- Code processing for Case EIP.
- Setup configuration.
- Case EIP setup.

### Code Processing for Case EIP

For Case EIP #1 (Case Synchronous Message), the entry point is in the service operation RC\_CASE\_REQUEST\_SYNC OnRequest handler. It calls ProcessCaseEIP function in FUNCLIB\_RC\_EIP.CASE\_EIP FieldFormula.

For Case EIP #2 (Case Asynchronous Message), the entry point is in service operation RC\_CASE\_REQUEST\_ASYNC, onNotify handler. It calls the same ProcessCaseEIP function as EIP #1.



For Case EIP #3 (Request Case Synchronous Message), the entry point is in service operation RC\_CASE\_INQUIRY\_REQ\_SYNC OnRequest handler. It calls ProcessCaseInquiry function in FUNCLIB\_RC\_EIP.CASE\_EIP FieldFormula.

## Setup Configuration

The two setup options for case EIP are:

- Number of notes for a case.
- Default value for Source EIP.

### Number of Notes for a Case

The Max # of Notes in Web Service field indicates the maximum number of notes to return in the request EIP. The case component can contain an unlimited number of notes. This setup affects Case EIP performance when trying to process hundreds or thousands of notes for a case. Based on your business requirements, you can set the upper limit number for Case EIP.

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**Note:** This setting is only applied to response messages. Request messages process all notes that a third party sends.

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For instance, the customer sets the default number of notes for the response message at five. When the request message contains more than five notes, the system processes all the notes that are saved into the case. When a case contains more than five notes and a third party is requiring case information, then the system returns only the five most recent notes in the response message.

This page shows the Max # of Notes in Web Service field on the Call Center Definition - Options page:

#### Image: Call Center Definition - Options page

This example illustrates the fields and controls on the Call Center Definition - Options page.

Enable Feature	Option	Notes
<input checked="" type="checkbox"/> Assign Person	Assign agent entering case	Automatically assign the case when it is saved
<input checked="" type="checkbox"/> Assign Provider Group	Assign based on Agent	Automatically assign the case when it is saved
<input checked="" type="checkbox"/> Call Center Manager	Angela Lucca	Call center manger for the selected business unit.
<input checked="" type="checkbox"/> Max # of Notes in Web Service	5	Limit the number of notes in Web Service if you tend to have many notes in your cases
<input checked="" type="checkbox"/> Product Prompt	All	Choose how you would like the product prompt to work

### Default Value for Source Web Service

A customer can define the source value to use when creating a case using the Case EIP. It can be a different source value from the cases that are created online.

This example shows the Case Defaults page:

### Image: Case Defaults page

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

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

Business Unit APP01 Appliances

Case Defaults Find | View All First 1 of 4 Last

\*Template Family RC\_SUPPORT Support Case Family

\*Component Name RC\_CASE Case

All Call Centers

New Case Status	Open - New Case
Resolved Case Status	Closed - Resolved
Reopened Case Status	Case Reopened
Duplicate Case Status	Canceled - Duplicate
Case Type	Question or Problem
Case Subtype	Product
Case Priority	Medium
Case Impact	
Urgency	
Case Severity	Onetime Occurrence
Source	Direct Call
Source Web Service	3rd Party
Source ERMS	Email
Source HCM	
Product Group	

**Note:** The source EIP web service options are driven by business unit.

### Case EIP Setup

Activate these service operations along with their handlers and routings:

- RC\_CASE\_REQUEST\_SYNC
- RC\_CASE\_REQUEST\_ASYNC
- RC\_CASE\_RESPONSE\_ASYNC
- RC\_CASE\_INQUIRY\_REQ\_SYNC

As delivered, PeopleSoft service operations are inactive. In both your PeopleSoft CRM and your third-party application, you must:

- Activate the required application service operations.
- Activate the service operation handler and routing.

- Set the associated message queue to run mode for asynchronous service operations.

See the product documentation for *PeopleTools: Integration Broker Service Operations Monitor* and *PeopleTools: Integration Broker Testing Utilities and Tools*.



# PeopleSoft Call Center Interactive Reports

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## Understanding Interactive Reports

PeopleSoft call center interactive reports are implementations of PeopleTools Analytic Calculation Engine (ACE). Interactive reports are dynamic and they provide analytic information to users. You can move data elements around on a report and view it using different dimensions. The ability to view reports at different angles, gives you visibility into the health of your call center, including the ability to:

- Detect trends that can be utilized for proactive problem management.
- Evaluate team and agent performance metrics.
- Anticipate training and staffing requirements.

You can save interactive reports, export them to Microsoft Excel, or print them as hard copies. While interactive reports are interactive, the communication between them and the CRM database is one-way, which means the changes you make on the reports do not affect the data in the database. From interactive reports, you are not allowed to transfer to any CRM components and access data. User roles control access to interactive reports.

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**Note:** You must have Internet Explorer 5.1 or higher to access these reports.

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## Launching and Working with Interactive Reports

Interactive reports use action types and workflow to capture response and restore times. If the action types defined for the response are not met, an Application Engine process updates the case with response and restore exceptions.

When you launch an interactive report, the system displays a view of the data that the system has captured. These views are built using PeopleTools Analytic Calculation Engine (ACE) technology.

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## Common Elements Used for Interactive Reports

### Run Control ID

Select from the list of run control IDs. These IDs identify a set of saved report parameters from previous launches and enable you to save time and reduce mistakes. Use the Add New Run Control tab to generate reports when you don't have a run with the desired business unit, customer, or date range.

### Business Unit

Select the business unit for which you want to launch the interactive report. This is a required field.

<b>All Customers</b>	Select to launch the interactive report for all customers within the selected business unit.
<b>Select Customer and Customer</b>	Select to launch the interactive report for an individual customer and then select a customer from the Customer field.
<b>Start Date</b>	Select the first date from which you want to view data for the interactive report. This is a required field.
<b>End Date</b>	Select the last date from which you want to view data for the interactive report. This is a required field.
<b>Launch Interactive Report</b>	Click to launch the Interactive Report. The system opens a separate window to display the data.

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## Launching and Viewing Interactive Reports

This section discusses how to:

- Launch and view the Service Operations Analysis report.
- Launch and view the Support Service Level Management Analysis report.
- Launch and view the Help Desk Service Level Management Analysis report.
- Launch and view the Change Metrics report.
- Launch and view the Forward Schedule report.

## Pages Used to Launch and View Interactive Reports

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Service Operations Analysis	RC_SUP_MUPD	Support, Interactive Reports, Service Operation Analysis	Launch the PeopleSoft Support Service Operations Analysis report.
Support Service Level Management Analysis	RC_SUP_SUPD	Support, Interactive Reports, Service Level Management	Launch the PeopleSoft Support Service Level Management Analysis report.
Help Desk Service Level Management Analysis	RC_HD_SUPD	HelpDesk, Interactive Reports, Service Level Management	Launch the PeopleSoft Help Desk Service Level Management Analysis report.
Change Metrics Update	RG_CHG_METRIX_UPD	HelpDesk, Interactive Reports, Change Request Metrics	Launch the PeopleSoft HelpDesk Change Metrics report.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Forward Schedule	RG_FWD_SCHED_UPD	HelpDesk, Interactive Reports, Forward Schedule of Changes	<p>Launch the PeopleSoft HelpDesk Forward Schedule report.</p> <p>This report captures change requests that are in the statuses of <i>Approved</i> and <i>Executing</i>. The reports should also have start and end dates populated on the requests.</p> <p>You must set the run control dates to encompass the start dates of the change requests in the above statuses. In other words, if you want to know how many requests are approved or executing and scheduled for the month of May, enter run control start dates of 5/1/2006 and 5/31/2006.</p>

### Related Links

"Understanding Interactive Reports (*PeopleSoft CRM 9.1 Application Fundamentals PeopleBook*)"

## Service Operations Analysis Page

Use the Service Operations Analysis page (RC\_SUP\_MUPD) to launch the PeopleSoft Support Service Operations Analysis report.

## Navigation

Support, Interactive Reports, Service Operation Analysis

### Image: Service Operations Analysis launch page

This example illustrates the fields and controls on the Service Operations Analysis launch page.

Existing Run Control | Add New Run Control

Report Name: Service Operations Analysis

Run Control Information

\*Run Control ID: 006

Run Control Criteria

\*Business Unit: US200

Customer Information

☒ All Customers ☐ Select Customer Customer:

Start Date: 01/01/2000 End Date: 12/31/2000

Launch Interactive Report

Service Operations Analysis

Product: All Products Provider Group: All Groups Agent: All Agents

Priority: All Priorities

	Opened Cases Count	Closed Cases Count	Cancelled Cases Count	Service Order Count	RMA Count
All Customers	20	0	0	0	0
Health Conscious.com	6	0	0	0	0
Lakeview Community College	4	0	0	0	0
MMA Property Management Group	6	0	0	0	0
Savannah Lee	2	0	0	0	0
Tomas Santiago	2	0	0	0	0

Use this report to track the number of cases opened, cases closed, cancelled cases, and service orders

## Support Service Level Management Analysis Page

Use the Support Service Level Management Analysis page (RC\_SUP\_SUPD) to launch the PeopleSoft Support Service Level Management Analysis report.



## Navigation

Support, Interactive Reports, Service Level Management

### Image: Support Service Level Management Analysis launch page

This example illustrates the fields and controls on the Support Service Level Management Analysis launch page.

Existing Run Control   Add New Run Control

Report Name   Support Service Level Management Analysis

Run Control Information

\*Run Control ID   002

Run Control Criteria

\*Business Unit   APP01

Customer Information

☒ All Customers   ☐ Select Customer   Customer  

\*Start Date   01/01/2005   \*End Date   12/31/2005

Launch Interactive Report

Support SLM Dashboard

Support Service Level Management Analysis

Customer: All Customers   Product: All Products   Provider Group: All Groups   Status: All Statuses   Status Category: All Status Categories

	Responded On-Time	Responded Late	% Responded Late	Restored On-Time	Restored Late	% Restored Late	Suspended	% Suspended
All Priorities	0	2	67	0	3	100	0	0
Low	0	0	0	0	1	100	0	0
Medium	0	2	100	0	2	100	0	0

Use this report to track the total number of cases in which the support agent or agents responded on time, responded late, restored service on time, restored service late, or suspended cases.

## Help Desk Service Level Management Analysis Page

Use the Help Desk Service Level Management Analysis page (RC\_HD\_SUPD) to launch the PeopleSoft Help Desk Service Level Management Analysis report.

## Navigation

HelpDesk, Interactive Reports, Service Level Management

### Image: Help Desk Service Level Management Analysis launch page

This example illustrates the fields and controls on the Help Desk Service Level Management Analysis launch page.

Existing Run Control | Add New Run Control | Customize Page | http

Report Name: Help Desk Service Level Management Analysis

Run Control Information

\*Run Control ID: 005

\*Business Unit: HRHDC

\*Start Date: 01/01/2005 | \*End Date: 06/30/2005

Launch Interactive Report

Help Desk Service

Help Desk Service Level Management Analysis

Employee: All Employees | Department: All Departments | Location: All Locations

Product: All Products | Provider Group: All Groups | Agent: All Agents

Status: All Statuses | Status Category: All Status Categories

	Responded On-Time	Responded Late	% Responded Late	Restored On-Time	Restored Late	% Restored Late	Suspended	% Suspended
All Priorities	0	0	0	0	0	0	0	0

Use this report to track the total number of cases in which the help desk agent or agents responded on time, responded late, restored service on time, restored service late, or suspended cases.

## Change Metrics Update Page

Use the Change Metrics Update page (RG\_CHG\_METRIX\_UPD) to launch the PeopleSoft HelpDesk Change Metrics report.

## Navigation

HelpDesk, Interactive Reports, Change Request Metrics

### Image: Change Metrics Update launch page

This example illustrates the fields and controls on the Change Metrics Update launch page.

Change Metrics Update    Change Metrics Add

### Change Metrics

**Run Control Information**

\*Run Control ID: 001  
 Description: Change Metrics 05  
 \*From Date: 01/01/2005  
 \*To Date: 12/31/2005

Launch Interactive Report

### Change Metrics

CHANGE REQUEST METRICS    Preferences    View All    First    1 of 1    Last    ?

Business Unit: All Business Units    Department: All Departments    Location: All Locations  
 Priority: All Priorities    Category: All Categories    Impact: All Impacts  
 Status: All Statuses

	Percent of Total Request	Number of Inserts
All Weeks	0.00	0

Use this report to track the number of requests opened.

## Forward Schedule Page

Use the Forward Schedule page (RG\_FWD\_SCHED\_UPD) to launch the PeopleSoft HelpDesk Forward Schedule report.

## Navigation

HelpDesk, Interactive Reports, Forward Schedule of Changes

### Image: Forward Schedule Update launch page

This example illustrates the fields and controls on the Forward Schedule Update launch page.

Forward Schedule - Report Date: 2009-08-21							
	Status	Phase	Request Type	Change Summary	Priority	Category	Impact
<b>ITHDK</b>							
400003	Approved	Scheduling	Hardware	Change Request For a Hardware Upgrade	Medium	Minor	Trivial
400002	In Review	Scheduling	Hardware	Change Request For a Hardware Fix	Medium	Minor	Minor
400001	New	Scheduling	Hardware	Change Request For a Hardware Upgrade	Medium	Major	Minor
<b>US200</b>							
400004	Approved	Implementation	Training Course	Change Request For a Training Course	Medium	Significant	Significant
400002	New	In Test	Software	Change Request for Software Requirement.	High	Minor	Major
400003	In Review	In Test	IT Infrastructure Management procedures	Change Request for Infrastructure Management	High	Significant	Significant
<b>US300</b>							
400004	Executing	In Test	Hardware	Change Request For a Hardware Facility	High	Significant	Significant
400003	Approved	Implementation	Hardware	Change Request For a Hardware Requirement	Medium	Major	Significant
400001	New	In Test	Software	Change Request For a Software Requirement	Medium	Minor	Significant
400005	Approved	In Test	Documentation	Change Request For a Problem in Documentation	Medium	Significant	Trivial
400002	In Review	In Test	Software	Change Request For a Software Requirement	Low	Significant	Significant

Use this report to view a forward schedule of changes.

The analytic grid will list all change requests having the start and end date within the requested *From Date* and *To Date*. The full list of fields in the report is as follows:

- Business Unit
- Change ID
- Status
- Phase
- Request Type
- Change Summary
- Priority
- Category
- Impact
- Start Date and Time

- End Date and Time
- Production Release Date
- Outage Required
- Requester
- Interested Parties
- Owner



# Integrating Oracle's Enterprise Manager with PeopleSoft CRM HelpDesk

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## Understanding Oracle's EM System Integration with PeopleSoft CRM

This section discusses:

- How it works.
- Integration flow process.
- Connector descriptor.
- Trouble ticket template.
- Sample case created from EM.

### How it works

Enterprise Manager (EM) is Oracle's integrated solution for administering and monitoring software and systems. It provides Application Performance Management, distributed database and application server administration, and automated tuning of Oracle environments.

Oracle's EM utilizes a notification system that enables users to set up event rules which generate notifications (for example you may want the system to issue an alert when disk space is 99% full). When such an event occurs, the system can create a case within Oracle's PeopleSoft HelpDesk application, which can assign a worker to take action to resolve the case.

Through the notification system, PeopleSoft Case Connector (trouble ticketing system connector) integrates with Oracle's Enterprise Manager. When the system triggers a rule, the connector is notified and a case is created or updated based on a trouble ticket template. The system then sends a response message with the case ID (ticket ID) back to Enterprise Manager.

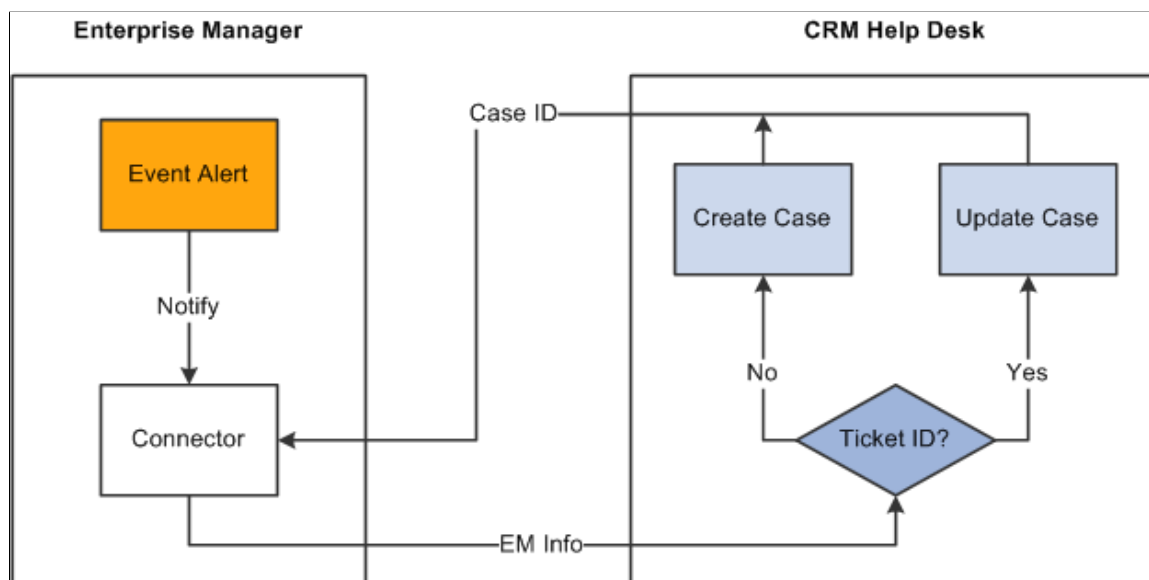
Once the case is created, a help desk user can drill into the details on the EM Alert page from the case. In addition, an EM user can drill back to the case from the EM Detail page.

## Integration flow process

When a defined rule in EM is triggered, the connector is notified to create or update a case. The case ID is then sent back to the EM system.

### Image: Integration Flow

This illustration shows the integration between PeopleSoft's CRM HelpDesk application and Oracle's EM system.



## Connector Descriptor

The connector descriptor describes how the EM system communicates with the CRM case trouble ticketing system. The connector descriptor is an XML based file that defines the PeopleSoft web service end point for service operations and the authentication schema. It also cross-references a URL to link an alert back to a case. Once the connector is deployed, the user can configure it on the connector console.

Authentication is completed while mapping data from web services security (WS-security or wsse) on the case to the TicketingConnector authentication. TicketingService methods, such as *createTicket* or *updateTicket*, are used in EM to create or update a ticket

The BaseURL in the connector descriptor is the base URL for the EM console. The ExternalURL is the URL pointing to CRM case.

---

**Note:** WS-Security is a building block that is used in conjunction with other web services and application-specific protocols to accommodate a wide variety of security models and encryption technologies. WS-Security describes enhancements to SOAP (Simple Object Access Protocol) messaging to provide quality of protection through message integrity, message confidentiality, and single message authentication. These mechanisms are used to accommodate a wide variety of security models and encryption technologies. For this release, EM supports UserNameToken security on SOAP headers.

---



## Trouble Ticket Template

The Trouble Ticket template is an XSLT file that transforms a message from the EM model format to the CRM model format. It is based on the XML schemas of the EM Alert and the Trouble Ticketing system.

The templates are used to construct tickets in the context of an EM alert. When a PeopleSoft Connector is notified, the EM alert information is transformed into a trouble-ticketing message that is used to create or update a case in the trouble ticketing system.

PeopleSoft delivers several default trouble ticket templates. You can easily modify them to fit your needs. The delivered XSL files include

- PSFTSampleTicketTemplate.xml; default ticket template used to create or update a case.
- PSFTSampleTicketTemplate\_AutoClose.xml: used to create a new case if none already existed, or to add a note and auto close an existing case after it has been updated.
- createTicketResponse.xml: used to transform the response from CRM to EM when the CreateCase or UpdateCase method is invoked. It returns the Case ID from CRM help desk as a Ticket ID to EM.

The system will create a new case or update an existing case depending on whether the ticket ID is provided in the EM alert message. If no case ID is provided from EM, the system creates a new case; otherwise, the system updates the case with the given case ID.

When creating a new case, the system adds an anonymous help desk case. The delivered default template specifies that the case will be created using the IT Help Desk business unit (*ITHDK*), but this can easily be modified in the template to use any desired business unit.

The system stores the EM alert summary information in the Case Summary field, and adds other information such as target type, metric, and key information in the Case Description field. Based on the business unit setup, the system can also auto-trigger the assignment engine in PeopleSoft CRM upon saving the case so that the case is assigned to the appropriate provider group and agent.

When updating an existing case, the system updates the severity on the HelpDesk case and adds the new EM information into a case note.

The following table lists the HelpDesk case fields which are given values in the delivered sample template when creating a new case.

**Note:** It is important to remember that these are sample templates provided only as examples, and that you may need to modify them to fit your requirements. Specifically, please note that some values specified here refer to sample data, not system data, and therefore are values that you would need to add to or modify in your production system.

<b>CRM HelpDesk Case Field</b>	<b>Value</b>
Case class	<i>R</i>
DisplayTemplateFamilyCode	<i>RC_HELPDESK</i>
Market	<i>GBL</i>
Vertical	<i>HD</i>

<b>CRM HelpDesk Case Field</b>	<b>Value</b>
BusinessUnit	<i>ITHDK</i>
AnonymousCaller	<i>Y</i>
CaseType	<i>PROBL</i>
Category	<i>NETWO</i>
SpecialtyType	<i>ACCES</i>
CaseSummary	<value of EM <i>Message</i> >
CaseDescription	<p>Based on these values from EM:</p> <ul style="list-style-type: none"> <li>• <i>EMUser</i></li> <li>• <i>ConnectorId</i></li> <li>• <i>Target Type</i></li> <li>• <i>MetricColumn</i></li> <li>• <i>MetricName</i></li> <li>• <i>KeyColumn</i></li> <li>• <i>KeyValues</i></li> <li>• <i>Severity</i></li> <li>• <i>CollectionTime</i></li> <li>• <i>EventPageURL</i></li> </ul>
Severity	<p>&lt;value of EM <i>SeverityCode</i>&gt;</p> <p>[note: requires CRM setup for Severity value]</p>
Source	<p><i>EM</i></p> <p>[note: requires CRM setup for Source value]</p>

When updating a case, the delivered sample template creates a note for the case using the following field values from the EM system:

- *EMUser*
- *ConnectorId*
- *Target Type*
- *MetricColumn*
- *MetricName*
- *KeyColumn*

- *KeyValues*
- *Severity*
- *CollectionTime*
- *EventPageURL*

In the delivered sample template, we also provide entries marked as comments, which list many fields without an assigned value. This lets you know which fields are available for use when creating or updating a case. You can simply un-comment the lines for the fields that you want to use and enter the appropriate values.

View the Case web service definition for more technical information on the available Case fields. You can view the elements and fields that are included in each Case operation message through PeopleTools. Cases are created using the CreateCase service operation, and are updated using the UpdateCase service operation under the web service RC\_CASE. Note that these service operations need to be activated as part of the integration setup.

To view a list of field names and aliases for a particular service operation:

1. Select PeopleTools, Integration Broker, Integration Setup, Service Operation.
2. Enter RC\_CASE in the Service Operation field and click Search.

The system lists all the service operations that are related to Case.

3. Select the service operation you want to view.
4. Click the View Message link in the Message Information area of the page for each message which you want to view .

The system opens the Message Definition page in a new browser.

5. Click the Message Name link under the Parts grid of the Message Definition page.
6. Click the plus sign next to the table name at the bottom of the page to view the fields and aliases associated with the message.

## Sample Case Created from EM

This is an example of case created from EM:

### Image: Case page (1 of 2)

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

**Case**
05/29/2009 12:24:30PM PDT
 My Time Zone

Save | Print | Spell Check | 360 360-Degree View | 360 360-Degree Search | >> Personalize

**Case ID** 220521
 **Status** Open - Possible Defect

**Employee ID** Anonymous
 **Employee Name**

**Summary** Memory Utilization is 46.59%#037;; cross...
 **Contact Method**

Case | Solution (0) | Summary | Notes (0) | Tasks (0) | Case History | Related Cases (0) | ▶

**Employee Information**

**Employee** Anonymous Employee
 **Department** Human Resources
 **Location** California Location
 **Alternate Contact**
**Asset Department** Business Services
 **Asset Location** California Location
 **Contact Method**
**Reported By** Anonymous Employee
 [Show Details](#)
[Search Again](#)

**Problem Information**

**\*Problem Summary**
 Memory Utilization is 46.59%, crossed warning (0) or critical
 **Description**
 Case created by EM PeopleSoft Connector
 EM User:
 ConnectorID:
 857992A77DDA41E88440AF586D0DDE4E
 Event Information:
 Target Type: host
 Metric Column: memUsedPct

**Case Information**

Main | More

☐ Global Case
 Quick Code
 Case Type Problem
 Case Subtype Asset
 \*Case Status Open - Poss Defect
 ☐ Resolved by First Contact
 Provider Group Network Operations
 Assigned To Erin McCoy
 Product Group Network
 Product IT1050
 Description Intranet
 Problem Type Other Problem
 Serial Number
 Asset Tag
 Installed No
 [Select Agreement](#)
 Error Code
 Error Message

**Image: Case page (2 of 2)**

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

The screenshot displays the 'Case page (2 of 2)' interface. It features a 'Suggested Action' section with a 'Description' field and a 'Related Actions' dropdown menu, accompanied by a 'Go' button. To the right, there is a vertical stack of dropdown menus for 'Category' (Network Related), 'Specialty Type' (Network Access), 'Detail', 'Case Priority' (High), 'Impact' (Minor), 'Urgency' (Low), and 'Case Severity' (Warning). Below these are four buttons: 'Save Case', 'Find Solutions', 'Escalate Case', and 'Match Cases'. At the bottom, an 'Audit History' section shows a table with two rows: 'Created' and 'Modified', both dated '05/29/2009 11:13AM PDT' and performed by 'CVP1'.

Note that certain values shown in this example (including those for department, location, status, and priority) are derived directly from CRM defaults or configuration rather than from the template or EM data.

**Note:** When updating cases, the system doesn't override the Case Summary and Description fields. The EM alert summary and other additional information is added, however, as a note for the case.

## Setting up Options in PeopleSoft CRM

This section discusses the following changes made within the PeopleSoft CRM system to enable the integration with Enterprise Manager:

- New source code.
- New severity codes.
- New Enterprise Manager link definition.
- New Enterprise Manager Active Analytics Framework (AAF) action type.
- New policy to create an Enterprise Manager related action.
- Related action changes on the Case page.

**Note:** Please refer to the appropriate sections in the documentation for additional information on using the Source page, Severity page, Case page, AAF, related actions, link definitions, and web services.

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

See [Understanding Link Setup](#).

See [Understanding Processing a Case](#).

See "Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)".

As you read the rest of this section keep in mind the following action items that must be completed in order to set up the integration:

- Create a new source code *EM*.
- Create new severity codes *15*, *20*, and *25*.
- Activate *Create Enterprise Manager Related Action* policy.

Also note that to enable the integration you must activate the Case web services operations under the RC\_CASE web service.

See *PeopleTools: Integration Broker Service Operations Monitor*

See *PeopleTools: Integration Broker Testing Utilities and Tools*

---

**Note:** In addition to these setup items within the PeopleSoft CRM system, remember that you must also deploy and configure the PeopleSoft connector, as described in a later section in this document.

---

## New Source for Enterprise Manager

PeopleSoft sample data includes a new row in the Source table (PS\_RC\_SOURCE\_TBL) for the IT Help Desk (*ITHDI*) setID to identify Enterprise Manager as a source for creating cases. The data contained in the Source field is EM, and the data contained in the Short Name and Long Description fields is Enterprise Mgr and Enterprise Manager, respectively.

Oracle delivers this information as sample data. You must add corresponding entries for any desired setID's in your production system

Access the Source page (Set Up CRM, Product Related, Call Center, Source.)

### Image: Source page

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

**Source**

SetID SHARE      Description SHARE

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

\* Required Field

Add an entry in the desired setID for the new source code *EM*. Note that this code must match the value for Source field on the trouble ticket template.

## New Severity Codes for Enterprise Manager

Oracle's PeopleSoft CRM application provides these severity codes as sample data for the IT HelpDesk (*ITHDI*) setID. Although EM uses many more severity codes, only these codes are used for integration purposes:

- 25 - Critical
- 20 - Warning
- 15 - Clear

Oracle delivers this information as sample data. You must add corresponding entries for any desired setID's in your production system.

Access the Severity page (Set Up CRM, Product Related, Call Center, Severity.)

**Image: Severity page**

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

**Severity**

SetID ITHD1      Description IT Help Desk

Severity	Self-Service	*Short Name	Self-Service Description	Long Description		
15	<input checked="" type="checkbox"/>	Clear	Clear	Clear	+	-
20	<input checked="" type="checkbox"/>	Warning	Warning	Warning	+	-
25	<input checked="" type="checkbox"/>	Critical	Critical	Critical	+	-
INTER	<input checked="" type="checkbox"/>	Intermittent	Intermittent	Intermittent	+	-
ONETI	<input checked="" type="checkbox"/>	Onetime Occurrence	Onetime Occurrence	Onetime Occurrence	+	-
RECUR	<input checked="" type="checkbox"/>	Recurring	Recurring	Recurring	+	-
REPRO	<input checked="" type="checkbox"/>	Reproducible	Reproducible	Reproducible	+	-

\* Required Field

Add entries in the desired setID for the three new severity codes (15 = Clear, 20 = Warning, and 25 = Critical).

## New Enterprise Manager Link Definition

Oracle's PeopleSoft CRM application includes a new link definition called *Enterprise Manager* under the Link Category *RELA*. This link definition is set up as *Solvable*. It will not be part of any link group; therefore, a user will not be able to perform this related action manually. It is a hidden option that can only be performed automatically by the system.

Access the Link Definition page (Set Up CRM, Product Related, Call Center, Link Definition).

### Image: Link Definition page (1 of 2)

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

The screenshot shows the 'Link Definition' page. On the left, there is a list of links with 'Enterprise Manager' selected. The main area is divided into sections: 'Link Details' and 'Transfer Details'. In 'Link Details', fields include \*Link Name (EM), \*Short Name (Enterprise Manager), Self-Service (Enterprise Manager), Long Description (Enterprise Manager), and \*Status (Active). There are checkboxes for Default, Solvable, Open in New Window, Self-Service, and SetID Enabled. The 'Transfer Details' section has radio buttons for Portal CREF and PeopleCode. Portal CREF fields include Portal Name, Page Name, Portal Object Name, and Action. PeopleCode fields include Class ID, Class Path, Package Tree Viewer, and Method Name. A 'Search Keys' table is also present with columns for \*Field Name, Term Name, and a Select Term button.

### Image: Link Definition page (2 of 2)

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

The screenshot shows the second page of the 'Link Definition' page. It includes a 'Drilldown Details' section with 'Navigation' and 'Market' fields. Below this is the 'Related Object Status Details' section, which has radio buttons for PeopleCode and Static Value. The PeopleCode section includes fields for Class ID (PCODE), Class Path (RC\_LINK:APPS\_RC), Package Tree Viewer, and Method Name (GetStatus). The Static Value section has a Static Status dropdown. At the bottom, there is a 'Modify System Data' button and a notice: 'This object is maintained by PeopleSoft.' followed by creation and modification dates and times, and the user 'PPLSOFT'.

## New Enterprise Manager AAF Action Type

To create a related action for the Enterprise Manager link definition on the Case page, Oracle's PeopleSoft CRM application delivers the new action type *Case Enterprise Manager*.

This action type can only be triggered from a component interface. You cannot trigger it from PeopleSoft pages. The Case Enterprise Manager action type will not have any design time configuration. It is delivered as system data.



Access the Action Type page (Enterprise Components, Active Analytics Framework, Action Framework, Register Action Type).

### Image: Register Action Type page

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

**Register Action Type** | **Action Type Triggers**

**Action Type**

Action Type Name: Case Enterprise Manager

Description: Enterprise Manager Action

Long Description: Create Enterprise Manager Related Action

**DesignTime Action Behavior**

Design Time Application Class: Package Tree Viewer

Design Time Class Path:

Action Text Application Class: Package Tree Viewer

Action Text Class Path:

☐ Configuration required

**RunTime Action Behavior**

Run Time Application Class: CaseEnterpriseManager | Package Tree Viewer

Run Time Class Path: RC\_AAF\_ACTIONS

☐ Actions of this type will terminate Active Analytics Framework processing

☐ Commit before triggering actions of this type

☐ Actions of this type are combinable

**Triggering Environment**

☐ Can be triggered by application engine

☐ Can be triggered by application messages

☐ Can be triggered from PeopleSoft pages

☒ Can be triggered by component interfaces

**Modify System Data**

This object is maintained by PeopleSoft.

This action type is associated with the *After a Helpdesk Case is Saved* trigger point.

## New Policy to Create an Enterprise Manager Related Action

Oracle's PeopleSoft CRM application includes a new policy called *Create Enterprise Manager Related Action* for the SHARE setID. This policy is associated with the *After a HelpDesk Case is Saved* trigger point. It is delivered with a status of *In Design*. You must update the status to *Active* if you wish to enable it for the EM integration.

The policy condition uses Enterprise Manager as its source. The policy action uses the Enterprise Manager AAF Action described earlier in this documentation.

Access the Build a Policy page (Enterprise Components, Active Analytics Framework, Policies, Manage Policies).

### Image: Build a Policy page

This example illustrates the fields and controls on the Build a Policy page.

**Build a Policy**

**Policy**

\*Policy Name: Create Enterprise Manager Related Action      Status: In Design

\*Trigger Point Name: After a HelpDesk Case is Saved      \*SetID: SHARE

Category Name: Call Center Operational Policies

Description: Relate Case to Enterprise Manager alert.

**Conditions**

IF  
Source equals Enterprise Mgr

Edit Condition

**Actions**

THEN  
Add an EM Related Action

Edit Actions

**Activate**

Activate      Start Date: 10/01/2006      End Date: 11/20/2020

**Associated Trigger Points**

Trigger Point	SetID
After a HelpDesk Case is Saved	SHARE

If you use a setID other than SHARE, copy this policy using the desired setID. Remember to activate the policy as part of the setup for the integration.

## Related Action Changes on the Case page

The system creates a related action on the case page when a new case is created from Enterprise Manager. The related action summary contains a link that enables the user to transfer to the EM Console.

When a case is updated from Enterprise Manager, the system adds a new note to the case, but does not create a related action.

Access the Related Actions page (Support, Search Cases, Related Actions).

### Image: Related Actions page

This example illustrates the fields and controls on the Related Actions page.

<a href="#">Solution (0)</a>	<a href="#">Summary</a>	<a href="#">Notes (0)</a>	<a href="#">Tasks (0)</a>	<a href="#">Case History</a>	<a href="#">Related Cases (0)</a>	<a href="#">Related Actions (1)</a>	<a href="#">D</a>
Related Action Summary							Customize   Find         First 1 of 1 Last
Type	Summary	Status	Date Created	Added By			
Enterprise Manager	<a href="#">Filesystem D:\ has 88.84% avail...</a>	Clear	09/26/2009 10:55AM PDT	David Perry			

To go to the EM Console Metrics Detail page, click the link under the Summary field in the Related Action Summary section.

## Deploying and Configuring the PeopleSoft Connector to the EM Console

To enable the integration, several files need to be copied to the EM Server, and the Peoplesoft connector must be deployed, registered, and configured. This section discusses:

- Copying the JAR file.
- Deploying and registering the connector.
- Configuring the connector.

### Copying the JAR File

PeopleSoft delivers a JAR file (PSFTConnector.jar) that includes the EM Event Model XML, the Peoplesoft Connector Descriptor XML, and the sample template XSLT files mentioned in this documentation for the Peoplesoft connector. Copy the JAR file to EM server oracle home.

### Deploying and Registering the Connector

Several Enterprise Manager Command-Line Utility (emctl) commands are used to deploy and register the connector.

Note that the deploying command line shown in this section is applicable for EM 10gR3 and 10gR4. If you are using different version of EM, the command line may be a little different.

To extract the JAR file into \$ORACLE\_HOME/sysman/connector/<connector\_name\_wo\_space> directory run this command

```
emctl extract_jar connector <jar_file_name> <connector name> <oracle home>
```

---

**Note:** The connector name is the name specified in the connector descriptor XML file. The command replaces the spaces in the connector name with underscores (\_) in connector\_name\_wo\_space. For instance, a connector called Peoplesoft Connector will have a directory of Peoplesoft\_Connector under the directory of the Oracle home connector. If the Peoplesoft\_Connector directory already exists, the extract\_jar command will extract files to this directory; otherwise, it will create a new directory called Peoplesoft\_Connector and copy files to it.

---

Register the connector using this command (use the user name *sysman*):

```
emctl register_connector connector <PSFTConnectorDescriptor.xml> <serverName> <port>
<databaseSid> <username> <password> <oracle home>
```

Oracle delivers two templates: The PeopleSoft Sample Template is used to create or update a case. The PeopleSoft Auto-Close Template automatically closes out an open case with a solvable EM action.

Register the shipped ticket templates using this command:

```
emctl register_ticket_template connector <PSFTSampleTicketTemplate.xml> <serverName>
> <port> <databaseSid> <username> <password> <connectorTypeName> <connectorName> <templateName>
<templateDescription>
```

The <connectorTypeName> and <connectorName> use the same value: *Peoplesoft Connector*. The <templateName> and <templateDescription> are quoted strings, which can have spaces in them. The template name and description are displayed on the EM console.

---

**Note:** Because the EM connector can only support one active connector, make sure to delete the connector from the console first. After you re-deploy a connector, you need to re-register the templates again even if they have not changed, as the templates are disconnected at the time the connector is deleted.

---

## Configuring the Connector

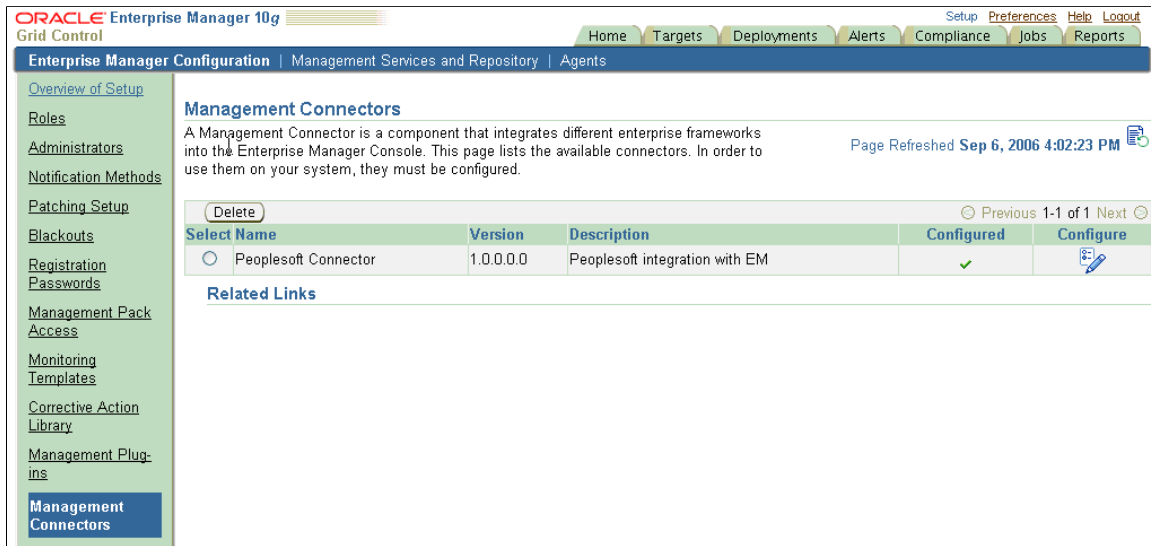
Once the connector is successfully deployed, you can log in to the EM console to configure the connector. On the configuration page, you can set up:

- *WS end points:* Specify WebService End Points for *createTicket*, *updateTicket* and *getTicket* web service operations.
- *WS credentials:* User ID and password to log in to the PeopleSoft CRM system for adding or updating a case.
- *Web console settings:* A URL that can transfer to the CRM case from the EM system. This is used on the EM metric detail page to drill into the case.
- *Grace period:* A time value that is compared against the data when an alert is cleared to the time when it has transitioned out of clear. If this span of time is greater than the grace period, a new ticket

is created for the alert, otherwise, the ticket is reopened. The idea is not to create the case for the same alert within a defined time period.

### Image: Oracle Enterprise Manager page

This example illustrates the fields and controls on the Oracle Enterprise Manager page.



Select *Peoplesoft Connector* from the Oracle Enterprise Manager page and then click the Configure button to access the following page. Use the Configure Management Connector page to enter URLs for the WebService End Points. You can also add a user name and password and enter web console settings (machine and port and database name).

### Image: Configure Management Connector: Peoplesoft Connector (General Tab)

This example illustrates the fields and controls on the Configure Management Connector: Peoplesoft Connector (General Tab).

The screenshot shows the 'Configure Management Connector: Peoplesoft Connector (General Tab)' page. It has two tabs: 'General' and 'Ticket Templates'. The 'General' tab is active. The page is titled 'Connection Settings' and includes a description: 'Enter a set of administrator credentials and the webservice end points for relevant operations of the ticketing system. These are required for communications.' Below this is a section for 'Web Service End Points' with a table for 'Operation' and 'Web Service End Point (URL)'. The table lists three operations: createTicket, getTicket, and updateTicket, all with the same URL: 'http://rtas094.us.oracle.com:8000/PSIGW/PeopleSoftServiceListeningConnector/C910R70B'. A tip indicates to replace '<midtier-server>' and '<servername>' with the actual values. Below the table are fields for 'User Name' (HELPGR), 'Password' (masked), and 'Ticket Number' (empty). A note says 'Enter a valid ticket number from the ticketing system to test connection to this system.' The 'Web Console Settings' section includes a checkbox for 'Enable web console features' (checked) and fields for 'machine and port' (rtas094.us.oracle.com:84) and 'database name' (c910r70bnt).

Operation	Web Service End Point (URL)
createTicket	http://rtas094.us.oracle.com:8000/PSIGW/PeopleSoftServiceListeningConnector/C910R70B
getTicket	http://rtas094.us.oracle.com:8000/PSIGW/PeopleSoftServiceListeningConnector/C910R70B
updateTicket	http://rtas094.us.oracle.com:8000/PSIGW/PeopleSoftServiceListeningConnector/C910R70B

\* User Name:

Password:

Ticket Number:

machine and port:

database name:

The Ticket Template page lists all registered templates for the connector.

### Image: Configure Management Connector: Peoplesoft Connector (Ticket Template Tab)

This example illustrates the fields and controls on the Configure Management Connector: Peoplesoft Connector (Ticket Template Tab).

ORACLE Enterprise Manager 10g

Grid Control

Home Targets Deployments Alerts Compliance Jobs Reports

Enterprise Manager Configuration | Management Services and Repository | Agents

Configure Management Connector:

Cancel OK

General Ticket Template

Ticket templates are XSLT files based upon provided XML schemas of the Enterprise Manager Alert model and the Trouble Ticketing System model. Templates are used to construct tickets in the context of an Enterprise Manager Alert. Templates must be loaded through emctl. This page lists the currently registered templates.

Delete

Select Name	Description
<input checked="" type="radio"/> Sample Ticket Auto Close	Sample Ticket Auto Close Template
<input type="radio"/> Sample Ticket	Sample Ticket Template

Set up your desired rules to use the registered template to create a case in the HelpDesk system.

### Image: Notification Rules: View Notification Rule page

This example illustrates the fields and controls on the Notification Rules: View Notification Rule page.

ORACLE Enterprise Manager 10g

Grid Control

Home Targets Deployments Alerts Compliance Jobs

Preferences

Notification Rules >

View Notification Rule: Testing Case Integration EM

This summarizes how and when Enterprise Manager will send notifications for this rule.

General

Owner: EMSUPER

Description: Public

Target Type: Host

Targets

All targets of type Host

Availability

Agent Unreachable: No

Agent Unreachable Resolved: No

Blackout Started: No

Blackout Ended: No

Metrics

Metric	Objects	Severity States	Corrective Action States	
			On Critical	On Warning
CPU Utilization (%)	n/a	Critical, Warning, Clear		
Memory Utilization (%)	n/a	Critical, Warning, Clear		

Policies

Policy	Category	Severity States	Corrective Action States
No policies selected			

Jobs

Job Type	Job Name	Job Owner	Job Status
No jobs selected			

Methods

E-mail Notification

No e-mail will be sent.

Advanced Notification Methods

Name	Type	Description
PSFTSampleTicketTemplate.xml	Java Callback	This notification method is used by the TTCconnector

Once a case is created or updated, the user can drill into case from the EM Metric Detail page

### Image: Alert History page

This example illustrates the fields and controls on the Alert History page.

**Alert History**

Comment for Most Recent Alert  Add Comment

Severity	Timestamp	Message	Last Comment	Details
	Jun 16, 2009 7:12:11 PM	Memory Utilization is 44.01%, crossed warning (100) or critical (0) threshold.	Ticket 220652 was updated.	
	Jun 16, 2009 6:20:16 PM	Memory Utilization is 43.8%, crossed warning (0) or critical (100) threshold.	Ticket 220652 was created.	
	Jun 12, 2009 9:18:25 PM	Memory Utilization is 41.89%, fallen below warning (99) and critical ( ) thresholds.	-	-

**TIP** Click on the details icon for user comments and system notifications.

**Related Links**

[Acknowledge](#)
[Compare Targets](#)
[Create/View Ticket](#)

[Metric and Policy Settings](#)

[Home](#) | [Targets](#) | [Deployments](#) | [Alerts](#) | [Compliance](#) | [Jobs](#) | [Reports](#) | [Setup](#) | [Preferences](#) | [Help](#) | [Logout](#)

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Please refer to Enterprise Manager documentation for additional information on using the EM Console and the Alert History page.





# Delivered Active Analytics Framework System Data for Call Center Applications

## Delivered Terms

PeopleSoft CRM delivers a variety of terms that you can use to build policies for your call center applications. They are categorized by subject areas using a folder structure. To facilitate term lookup when building a policy or creating a correspondence template, the system displays a term selection page.

There are over 100 terms in the Case Details folder. The following list is a small subset of all of the delivered terms. These terms are typically used when building policies that impact the PeopleSoft Support and HelpDesk applications:

<b><i>Subject Area</i></b>	<b><i>Term</i></b>	<b><i>Description</i></b>
Business Processes	Case Sample Worklist Operator ID	Returns the operator ID of the sign-on user as a string.
Case Sample Structured Worklist Rowset	Returns the operator ID of the sign-on user as a rowset.	
Case Details	Case ID	Returns the ID of the case.
Case Restore Minutes	Returns the number of minutes, based upon the entitlements, within which the case should be completed.	
Case Response Met Date	Returns the date the agent responded to the problem associated with the case.	
Case Restore Met Date	Returns the date the technician restored service or fixed the problem associated with the case.	
Account Number Specified in Case	Returns the account number specified on the case.	
Site Identification Number	Returns the site identification number or SIN.	
Case Notes Details	Returns the details from the notes that were entered for a case.	
Case Status Category	Returns the case status category.	
Case Agreement Warranty	Returns the warranty name associated with the case.	

<b>Subject Area</b>	<b>Term</b>	<b>Description</b>
Case Agreement Line	Retrieves the case agreement line for a specific case.	
Asset Tag	Returns the asset number of the installed product.	
Serial ID	Returns the serial ID of the product that is entered on the case.	
Person PIN	Returns the personal identification number or PIN of the employee associated with the case.	
BO_ID of Case Reported By	Returns the business object ID of the contact person who reported the case.	
BO_ID of the Customer Reporting the Case	Returns the business object ID of the customer reporting the case.	
Role Type ID of the Customer Reporting the Case	Returns the role type ID of the customer reporting the case.	
Role Type ID of the Contact Reporting the Case	Returns the role type ID of the contact reporting the case.	
BO_ID of the Site Reporting the Case	Returns the business object ID of the site reported on the case.	
BO_ID of the Contact Reporting the Case	Returns the business object ID of the contact reporting the case.	
Work Order Description Change	Returns the description of the work order.	
Link Definition	Select a Solution <SOLUTION_ID>	Allows users to select a solution.
Select a Business Project<BP_ID>	Allows users to select a business project.	
Select a Branch Script <SCRIPT_ID>	Allows users to select a branch script.	
Select a Dialog Business Unit <BUSINESS_UNIT>	Allows users to select a business unit under which their dialogs would reside.	
Select a Dialog ID <DIALOG_ID>	Allows users to select a dialog ID.	
Select an External Event Trigger <EXT_EVENT_TRIGGER>	Allows users to select an external event.	
Notification Delay	<Percentage> Restore Minutes	Used to specify the percentage of entitled restore time when a notification can be sent.
<Percentage> Response Minutes	Used to specify the percentage of entitled response time when a notification can be sent.	

<b><i>Subject Area</i></b>	<b><i>Term</i></b>	<b><i>Description</i></b>
Case Metrics	Number of Priority <PRIORITY> Cases	Returns the number of priority cases.
RMA Details	RMA Business Unit	Returns the RMA Business Unit.
RMA ID	Returns the RMA ID	



# PeopleSoft CRM Call Center Reports

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## PeopleSoft CRM Call Center Reports: A to Z

The tables in this topic list the PeopleSoft Support and PeopleSoft HelpDesk reports, sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: PeopleSoft Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft.*
- *PeopleTools: SQL Language Reference for PeopleSoft*

For samples of these reports, see the [Report Samples](#) that are published with this online documentation.

This 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*.

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**Note:** For most reports the query name and report name are the same. If the query name is different, it appears in the Report ID and Report Name column. Unless otherwise noted, the from date and through date for the cases included in a report refer to the case creation date.

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## PeopleSoft HelpDesk Reports

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
RCC1002 HelpDesk Cases By Agent	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	HelpDesk, Reports, Case By Agent, HelpDesk Case By Agent	RUN_RCC1002
RCC1003 HelpDesk Cases By Department	<p>This report lists the departments that have reported cases. For each department, the report shows the number of cases reported.</p>	HelpDesk, Reports, Case By Department, HelpDesk Case By Department	RUN_RCC1003
RCC1004 HelpDesk Case By Priority ( RC_CASES_BY_PRIORITY)	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	HelpDesk, Reports, Case By Priority, HelpDesk Case By Priority	RUN_RCC1004
RCC1005 HelpDesk Cases By Type	<p>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.</p>	HelpDesk, Reports, Case By Type, HelpDesk Case By Type	RUN_RCC1005
RCC1006 HelpDesk Cases By Status	<p>This report lists case statuses and gives the number of cases with each status.</p>	HelpDesk, Reports, Case By Status, HelpDesk Case By Status	RUN_RCC1006
RCC1007 HelpDesk Case By Category/Type/Detail ( HDBYCATETYDET)	<p>This report groups cases by category and provides the total number of cases for each category. For each case, the report shows the case ID, category, type, detail, creation date, caller name, status, and summary.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	HelpDesk, Reports, Case By Category/Type/Detail, HelpDesk Case By Category/Type/Detail	RUN_RCC1007

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
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
RCC1009 HelpDesk Cases Status By Agent	This report lists agents to whom cases have been assigned. For each agent, the report shows the agent's ID and name and the number of open cases for that agent in total and broken out by case status.	HelpDesk, Reports, Case Status By Agent, HelpDesk Case Status By Agent	RUN_RCC1009
RCC1010 HelpDesk Time To Close By Agent (RC_CLOSEBYAGENT)	This report lists agents who have been assigned cases. For each agent, the report shows the agent's ID and name, a list of the agent's closed cases, the total number of cases closed, and the average number of days to close. The case shows the case ID, priority, date opened, date closed, and days to close.	HelpDesk, Reports, Time To Close By Agent, HelpDesk Time To Close By Agent	RUN_RCC1010
RCC1011 HelpDesk Cases By Employee	This report lists employees who have reported cases. For each employee, the report shows the number of cases opened. It can be run using either Crystal Reports or BI Publisher.	HelpDesk, Reports, Case By Employee, HelpDesk Case By Employee	RUN_RCC1011
RCC1012 HelpDesk Cases by Business Project	This report lists business projects that have been used in cases. For each business project, the report shows the number of cases where the business project was used.	HelpDesk, Reports, Case By Business Projects, HelpDesk Case By Business Projects	RUN_RCC1012
RCC2009 HelpDesk Employees With Case	This report lists employees who opened cases during the specified time period. For each employee, the report provides a name, location, department, telephone number with extension, and email address. No case information appears on this report.	HelpDesk, Reports, Employees with Case, HelpDesk Employees With Case	RUN_RCC2009

## PeopleSoft Support Reports

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
RCC2000  Agreement Type Statistics (RCC_3007)	<p>This report provides statistics for agreements used during a specified date range, including the number of cases opened, the number of cases closed and the average time to close in days and in hours.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	Support, Reports, Agreement Statistics, Agreement Statistics	RUN_RCC2000
RCC2001  Case Information	<p>This report provides detailed information for cases, including most of the data shown in the case component.</p>	Support, Reports, Support Case Information, Case Information	RUN_RCC2001
RCC2002  Case by Age	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	Support, Reports, Cases By Age, Cases By Age	RUN_RCC2002
RCC2003  Cases by Agent (RC_CASESBYAGENT)	<p>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.</p>	Support, Reports, Cases By Agent, Cases By Agent	RUN_RCC2003
RCC2004  Cases by Customer	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	Support, Reports, Cases By Customer, Cases By Customer	RUN_RCC2004



<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
RCC2005 Cases by Priority	This report categorizes cases by priority and status, then by customer. For each case, the report shows the case ID, case type, date created, and subject.	Support, Reports, Cases By Priority, Cases by Priority	RUN_RCC2005
RCC2006 Cases by Product	This report categorizes cases by product. For each case, the report shows the product ID, case ID, priority, status, case type, contact name, date created, assigned to agent, and subject.	Support, Reports, Cases By Product, Cases by Product	RUN_RCC2006
RCC2007 Cases by Type	This report categorizes cases by case type. For each case, the report shows the case ID, priority, status, contact name, date created, assigned to agent, and subject.	Support, Reports, Cases by Type, Cases By Type	RUN_RCC2007
RCC2008 Cases Reopened	<p>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.</p> <hr/> <p><b>Note:</b> This report requires that the Case Re-Opened policy be activated in the Predictive Analytics Framework definition.</p> <hr/>	Support, Reports, Cases Reopened, Cases Reopened	RUN_RCC2008
RCC2013 Support Agreement Usage	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	Support, Reports, Support Agreement Dates, Support Agreement Dates	RUN_RCC2013

## Related Links

"Understanding AAF (*PeopleSoft CRM 9.2: Automation and Configuration Tools*)"

## Solution Reports

<b>Report ID and Report Name</b>	<b>Description</b>	<b>Navigation</b>	<b>Run Control Page</b>
RCC2012 Solutions Usage	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	Solutions, Reports, Solutions Usage, Solutions Usage	RUN_RCC2012
RCC2014 Top Ten Solutions by Product	<p>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.</p> <p>This report can be run using either Crystal Reports or BI Publisher.</p>	Solutions, Reports, Top Ten Solutions by Product, Top Ten Solutions by Product	RUN_RCC2014