
PeopleSoft Enterprise 9 CRM Dashboard Applications PeopleBook

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PeopleSoft Enterprise 9 CRM Dashboard Applications PeopleBook
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About This PeopleBook

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

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

PeopleSoft Enterprise Application Prerequisites

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

You might also want to complete at least one introductory training course, if applicable.

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

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

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, 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>	Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <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	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

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

PeopleSoft Enterprise CRM Dashboard Applications Preface

This chapter discusses:

- PeopleSoft Enterprise CRM Dashboard Applications.
- Oracle Business Activity Monitoring.
- PeopleSoft Enterprise Dashboard Integration Framework.
- PeopleTools PeopleBooks.

PeopleSoft Enterprise CRM Dashboard Applications

The PeopleSoft CRM Dashboards Applications PeopleBook discusses common dimensions, terminology, reports, actions, thresholds, alerts, security, data, data objects, and the plans that are used in the creation of dashboards for these applications:

- PeopleSoft Sales.
- PeopleSoft Order Capture.
- PeopleSoft Contact Center.

Note. PeopleSoft Contact Center applications include PeopleSoft Support (Services), HelpDesk, and HelpDesk for Human Resources.

Oracle Business Activity Monitoring

The documentation for Oracle BAM (Business Activity Monitoring) contains essential information describing the setup and design of real-time reports, alerts, and rules. This book contains important topics that apply to many or all dashboard applications across the PeopleSoft Enterprise CRM product line.

Oracle BAM includes these modules:

- Oracle BAM Active Viewer

This module enables you to view reports that were written in BAM Active Studio. As data continuously changes, the system updates the graphs and charts that are used to make up the reports.

- Oracle BAM Active Studio

This module is a robust web-based reporting tool for creating and delivering reports used in Oracle BAM. From Oracle BAM Active Studio, power users share reports with other users and create alert rules for report delivery. Reports are either real-time reports, with live data updating on screen, or point-in-time reports

- Oracle BAM Architect

This module is the user interface for the data designer. Through Oracle BAM Architect, the data designer creates and manages data objects, manages transaction source processing, and creates and manages plans. Plans created in the Data Flow Editor send the information from message sources to data objects. The data designer can also create alert rules for running plans.

- Oracle BAM Administrator

This module is the application that the system administrator employs for user management, message management, and plan monitoring in Oracle BAM. Using Oracle BAM Administrator, the system administrator manages roles and security levels, manages the message center, and the plans that load data into the Oracle BAM Active Data Cache (ADC).

See Also

Oracle BAM Active Studio User's Guide

Oracle BAM Architect User's Guide

Oracle BAM Administrator's Guide

Oracle BAM Enterprise Link Design Studio User's Guide

PeopleSoft Enterprise Dashboard Integration Framework

The *PeopleSoft Enterprise Dashboard Integration Framework 9 PeopleBook* discusses these topics:

- Dashboard architecture

Describes the system architecture and how data moves between the PeopleSoft Internet Architecture and the ADC via the dashboard messaging system and Enterprise Link. This documentation also explains the denormalization of data and the use of the star schema in the ADC.

- Data messaging

Explains how data moves from the CRM database to the dashboards.

- Scheduled data loads

Explains how pages are used to set up schedules to move static data to the Extraction, Transformation and Loading (ETL) tool and to the ADC.

- Dashboard setup

Describes the installation options, including environment settings, messaging settings, and role information.

- Dashboard security

Explains that while the dashboard system is outside of Pure Internet Architecture, users access both systems with a single signon. This section also discusses object security and the use of Oracle BAM Administrator to secure specific reports and views (as well as their underlying data objects), describes the security model in Oracle BAM Administrator (users, roles, groups, and so on), compares it to the PeopleSoft security model, and describes the process of keeping the two models synchronized.

- Dashboard actions and setup

Describes the use of actions as a way to give dashboard users the ability to act on the information that the dashboards present. This section explains that generating a new action involves the creation of an action page in Oracle BAM.

See Also

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, “PeopleSoft Enterprise Dashboard Integration Framework Preface”

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the Enterprise PeopleTools 8.48 PeopleBooks.

CHAPTER 1

Getting Started with CRM Dashboard Applications

This chapter discusses:

- CRM dashboard applications overview.
- CRM dashboard applications integrations.
- CRM dashboard applications implementation.

PeopleSoft Enterprise CRM Dashboard Applications Overview

Operational dashboards present real-time information about your business operations and enable users to take appropriate action based on that information. The information appears in interactive graphical reports that enable a business user to quickly understand the health of their operation at a summary level and to drill into more detailed information.

Targets and thresholds are integrated into the reports to help users readily identify business risks. System-generated alerts notify users when predefined conditions are met. A dashboard report corresponds to a specific content area, such as Sales, Order Capture, or any one of the PeopleSoft Contact Center applications.

The data that appears in the dashboard originates in one or more transactional systems. An efficient messaging system ensures that data changes in the transactional systems are sent immediately to the dashboard system and that dashboard reports are updated in near real time.

Messages are also sent the other direction. When a dashboard user initiates an action, the dashboard system sends the action information back to the transactional system where the action is completed. At this point, any data changes that are the result of the action are immediately sent back to the dashboard system where the user can see the results of the actions.

Since actions are asynchronous, the user does not have to wait for the action to complete. The user initiates the action and gets real-time confirmation that the request was successfully transmitted to the appropriate application in PeopleSoft CRM.

PeopleSoft Enterprise CRM Dashboard Application Integrations

Operational dashboards extend the functionality of the current PeopleSoft Sales, Order Capture, and Contact Center applications. PeopleSoft dashboard applications integrate with the base PeopleSoft applications for which they were designed:

PeopleSoft Enterprise CRM Contact Center Applications

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

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

- PeopleSoft Support (Services) 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 resource inquiries and issues.

PeopleSoft Enterprise Order Capture

PeopleSoft Order Capture delivers order and quote management functionality for both tangible and nontangible products, such as services. It provides integration with both PeopleSoft and third party fulfillment systems or supply chain management products. A tight integration with PeopleSoft Supply Chain Management (PeopleSoft SCM) provides order fulfillment and detailed maintenance activity functionality. Enterprise integration points (EIPs) support the sending and receiving of orders, quotes, product availability, and order status information.

PeopleSoft Enterprise Sales

PeopleSoft Sales enables you to enter, assign, and track sales leads and opportunities. After you enter sales opportunities into your database, you can view your opportunity pipeline and generate forecasts to manage your sales efforts. With this application, you can also define territory trees that represent the sales organization, create or import sales leads, convert leads to opportunities, create sales opportunities, and assign leads or opportunities to sales representatives using the territory tree.

PeopleSoft Enterprise CRM Dashboard Applications Implementation

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, and troubleshooting guidelines.

See Also

PeopleSoft Enterprise CRM 9 Call Center Applications PeopleBook, “Getting Started”

PeopleSoft Enterprise CRM 9 Order Capture Applications PeopleBook, “Order Capture Applications”

PeopleSoft Enterprise CRM 9 Sales PeopleBook

CHAPTER 2

Understanding Common Dimensions and Objects

This chapter discusses:

- Dashboard data objects.
- Common dimensions and data objects.
- Drilling to other dashboard information and the transactional system.
- Currency handling.
- SetID indirection.

Dashboard Data Objects

Dashboard data objects are created for these dimensions and populated from CRM data:

- Business Unit
- Contact
- Country
- Currency
- Currency Rate
- Current Currency Rate
- Customer
- Department
- Installation Options
- Location
- Partner
- Person
- Product Group
- Product/Item
- Provider Group
- Region
- Set ID Indirection
- State

- Task Priority
- Task Type
- Unit of Measure

These data objects are populated from CRM data, but are not used as report dimensions or fact dimensions:

- Business Unit Security (row level security filter)
- Email Template (email alert body text)
- Provider Agent (contact center action prompt value list)
- Set ID Security (row level security filter)

Common Dimensions and Data Objects

This section discusses:

- Common dimensions.
- Common data objects.

Common Dimensions

Because multiple fact tables can share the same dimensions, they are commonly used by the different CRM dashboard content areas. In general, if a dimension is used by only one content area but could be used by others, it is designated as a common dimension. For a dimension to be designated as *common*, it must contain fields that are currently needed by more than one content area.

For example *Company* and *Currency Code* are common dimensions. Product-specific dimensions are discussed in the chapters for the respective dashboard content area.

These dimensions are common to multiple dashboard content areas:

Dimension	Attributes	Trigger Point	Product
Business Unit	<ul style="list-style-type: none"> • Business Unit Code • Business Unit • Call Center Manager Person ID * • Call Center Manager • Call Center Manager Email Address * • Call Center Status 	Save	Contact Center Order Capture Sales
Contact	<ul style="list-style-type: none"> • Business Object ID • Contact • Email Address 	Save	Contact Center Order Capture Sales

Dimension	Attributes	Trigger Point	Product
Country	<ul style="list-style-type: none"> • Country Code • Country 	Save	Contact Center Order Capture Sales All Note. Only needed if the country code is not sufficient and the description is required.
Currency	<ul style="list-style-type: none"> • Currency Code • Currency • Decimal Positions 	Save	Sales Note. Only needed if the currency description is required. These values perform currency exchange calculations not in the dashboard. The system selects the most current descriptions and rates.
Currency Rate	<ul style="list-style-type: none"> • Currency Code • Installed Currency Multiplier • United States Currency Multiplier • Euro Currency Multiplier • Yen Currency Multiplier • Canadian Currency Multiplier • Australian Currency Multiplier • Effective Date 	Daily Upload	Sales Order Capture
Current Currency Rate	<ul style="list-style-type: none"> • Currency Code • Installed Currency Multiplier • United States Currency Multiplier • Euro Currency Multiplier • Yen Currency Multiplier • Canadian Currency Multiplier • Australian Currency Multiplier 	Daily Upload	Sales

Dimension	Attributes	Trigger Point	Product
Customer	<ul style="list-style-type: none"> • Business Object ID • Set ID • Customer ID • Role Type ID • Customer • Email Address • Assessment ID • Assessment • Segment Code 	Save	Contact Center Sales
Department	<ul style="list-style-type: none"> • Set ID • Department Code • Department 	Save	Contact Center Note. The system retrieves the most current description for the department ID.
Installation Options	<ul style="list-style-type: none"> • PeopleSoft Webserver URL • Default Currency Code 	Save	Contact Center Order Capture Sales Note. Used for currency and actions.
Location	<ul style="list-style-type: none"> • Set ID • Location Code • Location 	Save	Contact Center Note. This data is effective-dated, so the system retrieves the most current description.
Partner	<ul style="list-style-type: none"> • Business Object ID • SetID • Partner 	Save	Sales

Dimension	Attributes	Trigger Point	Product
Person	<ul style="list-style-type: none"> • Business Object ID • Person ID • Person • Department SetID • Department Code • Department • Employee ID • Gender • Location Set ID • Location Code • Location • Supervisor Person ID • Supervisor • Supervisor Email Address • Email Address • Manager Level ID • Manager Level 	Save	Contact Center Sales
Product Group	<ul style="list-style-type: none"> • Set ID • Product Group Type • Product Group Code • Product Group Text • Product Group 	Save	Order Capture Note. Product group is effective-dated, so the system retrieves the most current description.
Product/Item	<ul style="list-style-type: none"> • Set ID • Product ID • Product Type • Product Category Code • Product Category • Product Brand Code • Product Brand • Product 	Save	Contact Center Order Capture Sales
Provider Group	<ul style="list-style-type: none"> • Set ID • Provider Group ID • Provider Group 	Save	Contact Center

Dimension	Attributes	Trigger Point	Product
Region	<ul style="list-style-type: none"> • Region Category • Region Code • Region 	Save	Order Capture Sales
Set ID Indirection	<ul style="list-style-type: none"> • Business Unit Code • Case Status Set ID • Case Priority Set ID • Case Category Set ID • Case Type Set ID • Case Impact Set ID • Case Problem Type Set ID • Case Severity Set ID • Case Source Set ID • Provider Group Set ID • Product Set ID • Agreement Set ID • Product Group Set ID • Carrier Set ID • Header Status Set ID • Line Status Set ID • Hold Code Set ID • Source Code Set ID • Capture Type Set ID 	Daily Upload	Call Center
State	<ul style="list-style-type: none"> • Country • Country Code • State • State Code • Description 	Daily Upload	Contact Center Order Capture Sales Note. When the user filters by country and state, the system can only select valid states for a country. Also, the description is required only if users want to search states by description and not by code.
Task Priority	<ul style="list-style-type: none"> • Task Priority • Task Priority Code • Priority Description 	Save	Contact Center Order Capture Sales

Dimension	Attributes	Trigger Point	Product
Task Type	<ul style="list-style-type: none"> Task Type Task Type Code Task Type Description 	Save	Contact Center Order Capture Sales Note. Used only for active tasks.
UOM (unit of measure)	<ul style="list-style-type: none"> UOM UOM Description Unit of Measure Code Unit of Measure 	Save	Order Capture The UOM description is required if the user needs to filter the UOM by description rather than code.

Common Data Objects

Common data objects are typically used to support security, email actions, or action drop-down menu lists.

These data objects are common to multiple dashboard content areas:

Object	Attributes	Trigger Point	Product
Business Unit Security	<ul style="list-style-type: none"> User Name Business Unit SID Business Unit 	Save	Contact Center Order Capture Sales
Email Template	<ul style="list-style-type: none"> Content Area Code Usage Name Template ID Template Name Email Subject Email Message Text 	Save	Contact Center
Provider Agent	<ul style="list-style-type: none"> Provider Group SID Set ID Provider Group ID Person SID Person ID Person 	Save	Contact Center
Set ID Security	Set ID User Name	Save	Contact Center Order Capture Sales

Drilling to Other Dashboard Information and the Transactional System

Dashboards enable business users to quickly understand the health of their operations at a summary level and to drill into more detailed information. Users can drill into the summary metrics or the graphical views on a summary report to access discovery reports that provide additional related data.

The hierarchical links at the top of the menu drop-down list enable users to drill down into the view data according to a predefined hierarchy. For example, if a view shows cases by priority and then by status, a user who is looking at cases by priority can drill down to see cases of a specified priority broken down by status.

There are also a list of actions that a user can select to drill into the transactional system to generate emails, initiate reassignments, update priorities and statuses, create tasks and notes, and manage orders, accounts, leads, and opportunities.

Note. The number of valid statuses that you can use to filter data may differ by release.

Currency Handling

The currency architecture for PeopleSoft CRM dashboard applications requires that you select a default currency. PeopleSoft CRM also provides a daily process for sending currency exchange rates to the dashboard so that financial data in transactions, which can be in any currency, can be converted to the default currency.

All reports show all currency data in the default currency. PeopleSoft does not, however, deliver support for switching the currency display. PeopleSoft does, however, provide an architecture that includes currency conversion rates to five predefined currencies in addition to the default currency.

To create custom reports that use different currencies, organizations can use BAM Active Studio. The creation of custom reports results in multiple sets of reports (the delivered reports showing data in the default currency and the custom reports showing data in other currencies.)

Although PeopleSoft considers this a customization, it provides you with the ability to utilize any available currency in your dashboards.

Because the PeopleSoft system can store several different types of exchange rates, the process that sends the exchange rates to the dashboard system requires you to select which rate type to use. The rate type is used to convert transaction currencies to the default currency.

At the time the dashboard application is installed, you set up an Application Engine process that sends currency rates to the dashboard. You do not need to initiate any further actions to run this process. It is run automatically as part of the RBD_MIDN job, which runs daily at five minutes after midnight. Although no setup is needed, implementers can use the PeopleTools Process Scheduler pages to change the schedule on which this job runs.

Note. Historical currency rates are not loaded when doing an initial data load. As an implementer, you are responsible for making sure currency rates are loaded for the days when orders are also loaded.

The PeopleSoft system delivers five currency codes in its dashboards:

- U.S. dollar (USD)
- Euro (EUR)
- Canadian dollar (CAN)

- Australian dollar (AUD)
- Japanese yen (JPY)

The currency rate table in the ADC looks similar to the table below, but with a row for every currency in the PeopleSoft system:

Default Currency	USD	EUR	CAD	AUD	JPY
USD	1.000	0.800	1.200	1.320	1.200
EUR	1.200	1.000	1.460	1.620	2.100
CAD	0.800	0.680	1.000	1.100	91.300
AUD	1.320	0.620	0.900	1.000	85.917
JPY	0.800	0.007	0.010	.0120	1.000

In each table that requires currency conversion, the dashboard system uses this rate table to perform the currency conversions on each monetary amount being reported.

You can use Oracle BAM to create additional columns that display information using currencies other than the default currency or the five predefined currencies.

Note. The Sales Dashboard application uses the installed currency multiplier in Oracle BAM to do its calculations. The system uses the currency code you select as your default currency on the Installation Options page for dashboards and the currency conversion rate from the common data object (Common/Current Currency Rate) in Oracle BAM to calculate amounts. Most currency conversions for Sales are completed in Oracle BAM Architect. Before the amount is displayed in the dashboard application, the system looks up the currency conversion rate based on the transaction currency and then multiplies that with the source amount.

See Also

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, “Setting Up the Dashboard,” Currency Settings

SetID Indirection

Within the PeopleSoft system, setID logic controls which values in a setup table are valid in certain contexts. For example, cases in one business unit can use a different set of statuses than cases in another business unit. To implement setID logic in the dashboard, the setID rules that are already established in PeopleTools tables must be replicated within the dashboard. The RBD_BUSET Application Engine process handles this replication.

The PeopleSoft system stores large amounts of information related to setID logic, most of which is not needed in the delivered dashboards. To avoid sending and storing extraneous information, the RBD_BUSET process sends only data for the relevant setID-controlled records. The relevant pages are identified in the SetID Indirection page, which is available using PeopleSoft Application Designer. PeopleSoft delivers system data for this page. This ensures that all necessary information is included in the dashboard applications.

See Also

Enterprise PeopleTools PeopleBook: PeopleSoft Application Designer

CHAPTER 3

Setting Up Email Templates

This chapter provides an overview on setting up email templates for dashboards and discusses how to initiate an email template setup.

Setting Up Email Templates for Dashboards

This section provides an overview and lists a prerequisite for setting up email templates for dashboards.

Understanding Email Template Setup for Dashboards

To use email templates in dashboards, you must first set them up using the correspondence management functionality within the PeopleSoft CRM system.

Within correspondence management, templates are associated with *usages* that determine which contexts are valid for the template. To make email templates available from within the dashboard system, identify the usages that are valid for each dashboard application. These can be the same usages that you use in your PeopleSoft system, or you can create new usages specifically for the dashboard applications.

Usages ensure that templates are invoked only from contexts where their tokens (variables to provide the recipient with useful contextual information) can be resolved. In the dashboard system, token resolution is limited to only those values that are available in the fact table that is the basis for the report from which the email is sent.

When a token exists in the template but is not available in the fact table, the system leaves the value blank. If there are multiple recipients, the system resolves the tokens separately for each recipient (for example, *Dear Mary Stewart, Dear John Smith, Dear Randy Jones*, and so on).

Within the dashboard system, the action pages where users can send email provide lists of templates with the appropriate usage. In some situations, you may want to set up more than one usage for a dashboard application. For example, not all Support Case templates are valid in every Support Case email situation. In this occurs, you don't want all usages to be included in the drop down list menu on the action page. You can use the usage values on your action page to filter which templates are available for the current report.

When a user submits correspondence from the dashboard system, the complete email message is sent from the dashboard back to the PeopleSoft CRM database, where it goes through normal correspondence management processing-including the creation of an interaction.

See Also

PeopleSoft Enterprise CRM 9 Automation and Configuration Tools PeopleBook, "Setting Up Correspondence Templates"

Prerequisite

Create the usages that are to be associated with your dashboard applications. To create a usage, go to Setup CRM, Common, Correspondence, Usage.

When you define a usage, you identify the component from which that usage is valid. If your template will be used in both your CRM application and the dashboard, select the actual component in the Component Name field on the Usage page.

For a dashboard-specific usage, however, there's not a component associated with dashboard context. In this situation, enter *RBD_INSTALL* in the required field so that you can save the usage definition.

Setting Up Email Templates for Dashboards

To set up email templates for dashboards, use the Email Templates (RBD_EML_TMPL) component.

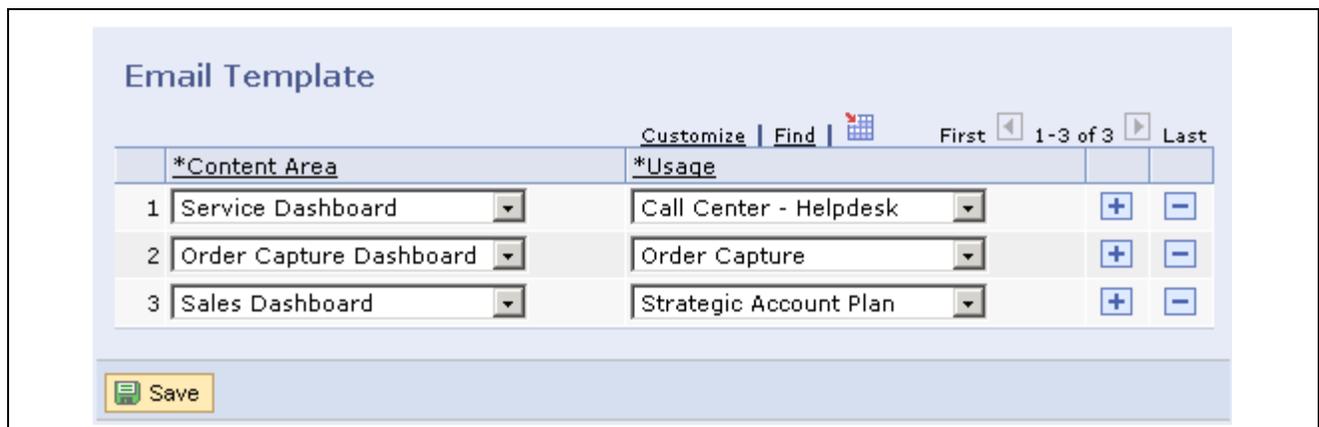
This section discusses how to set up email templates for dashboards.

Page Used to Set Up Email Templates for Dashboards

Page Name	Object Name	Navigation	Usage
Email Templates	RBD_EML_TMPL	Set Up CRM, Product Related, Dashboard, Email Template	Assign email templates to content areas and usages.

Setting Up Email Templates for Dashboards

Access the Email Templates page



Email Template page

Content Area

Select the content area or dashboard for which you want to use a correspondence template.

Usage

Select the usage that identifies valid email templates for the selected content area. To create a new usage, go to Set Up CRM, Common Definitions, Correspondence, Usage.

CHAPTER 4

Loading Dashboard Data

This chapter provides an overview of the data load process and discusses how to:

- Define application-specific initial data load options.
- Run the initial data load process.

Understanding the Data Load Process

This section discusses:

- The initial data load.
- Data objects for dimensions.
- Summary table data.
- Data deletion plans.

Note. To view a list of the plans, alerts and reports that PeopleSoft delivers to facilitate data loads, refer to the appendix for the dashboard application that you are using.

The Initial Data Load

PeopleSoft CRM provides the CRM Initial Data Load (RBD_INIT_DRV) Application Engine process to perform the initial load of CRM data into the dashboard system. The initial data load ensures that dashboard reports accurately reflect the current state of business operations. By running the initial data load, you give dashboard users access to meaningful reports right away.

Note. If you implementing dashboards for PeopleSoft Order Capture, you must run the Hold Predictions and Business Project Predictions Application Engine programs before you do an initial data load.

See [Chapter 6, “Using the PeopleSoft Enterprise Order Capture Dashboard,” Setting Up Hold and Business Project Predictions for PeopleSoft Order Capture, page 84.](#)

Data Loads for Facts and Dimensions

For performance reasons, it is critical that the initial load process load dimension data before fact data. This sequence optimizes performance because the dashboard system does not have to perform the complex lookups that would be required if, for example, a case arrived in the dashboard system before the arrival of the customer that the case references.

To ensure that dimension data is loaded first, you must perform the initial data load in three phases:

1. Run the initial data load process with settings for loading dimension data.

The initial data settings include mutually exclusive options for processing dimensions and facts.

2. Verify that all dimension data has been successfully loaded.

After the initial data load finishes sending the dimension data, Oracle BAM still requires time to process the incoming messages and save the data to the Active Data Cache (ADC). To ensure that all Oracle BAM processing completed successfully, you must access the Active Data Cache (ADC) directly and individually inspect each of the dimension data objects to verify that the data is loaded. These data objects are listed in the next section of this chapter.

For any dimension that fails to load, use the Batch Data Load process (part of the dashboard integration framework) to load just the object that corresponds to the missing dimension.

See *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook*, “Setting Up the Dashboard,” Initiating a Batch Data Load.

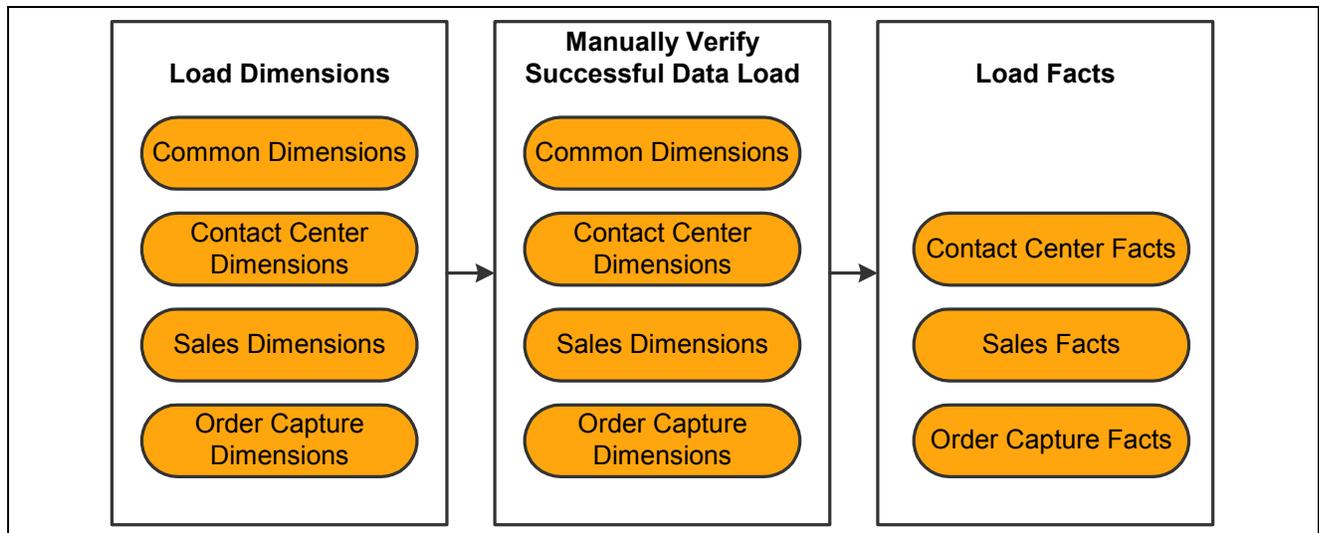
3. Run the initial data load process with settings for loading facts.

The option to load facts for a particular dashboard is not available until that dashboard’s dimensions *and* the common dimensions have been loaded.

When loading either dimensions or facts, you can choose which dashboard applications to load: Contact Center Dashboards, the Sales Dashboard, and the Order Capture Dashboard. (Contact Center Dashboards includes the dashboards for PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources.)

When loading dimensions, you have an additional option: common dimensions. These are tables such as product and customer that are shared by multiple dashboard applications.

This diagram illustrates the three phases of the initial load and the subsets of data for each phase:



Initial load phases

Note. For purposes of the initial data load, the separation of data into dimensions and facts ensures that tables load in the proper sequence. There are a few dimensions that are actually loaded with facts because the dimensions have dependencies on other dimensions.

Processing Details

The main process for the CRM initial data load is the RBD_INIT_DRV Application Engine process. This process does not actually perform the data load; instead, it schedules an instance of the RBD_INIT_APP Application Engine process for each subset of data that you've included in the data load.

If any of the RBD_INIT_APP processes error out, resolve the issue and restart the instance of the process that had the error. Do not schedule a new instance of the RBD_INIT_DRV process. Restarting the RBD_INIT_APP process improves performance because the system doesn't have to start at the beginning of the initial load but can instead pick up right at the point where the error occurred.

Because of the high volume of data involved in the initial data load, PeopleSoft CRM strongly recommends that customers with multiple dashboard applications set up parallel processing at installation time. Parallel processing enables the system to load data for multiple applications at once.

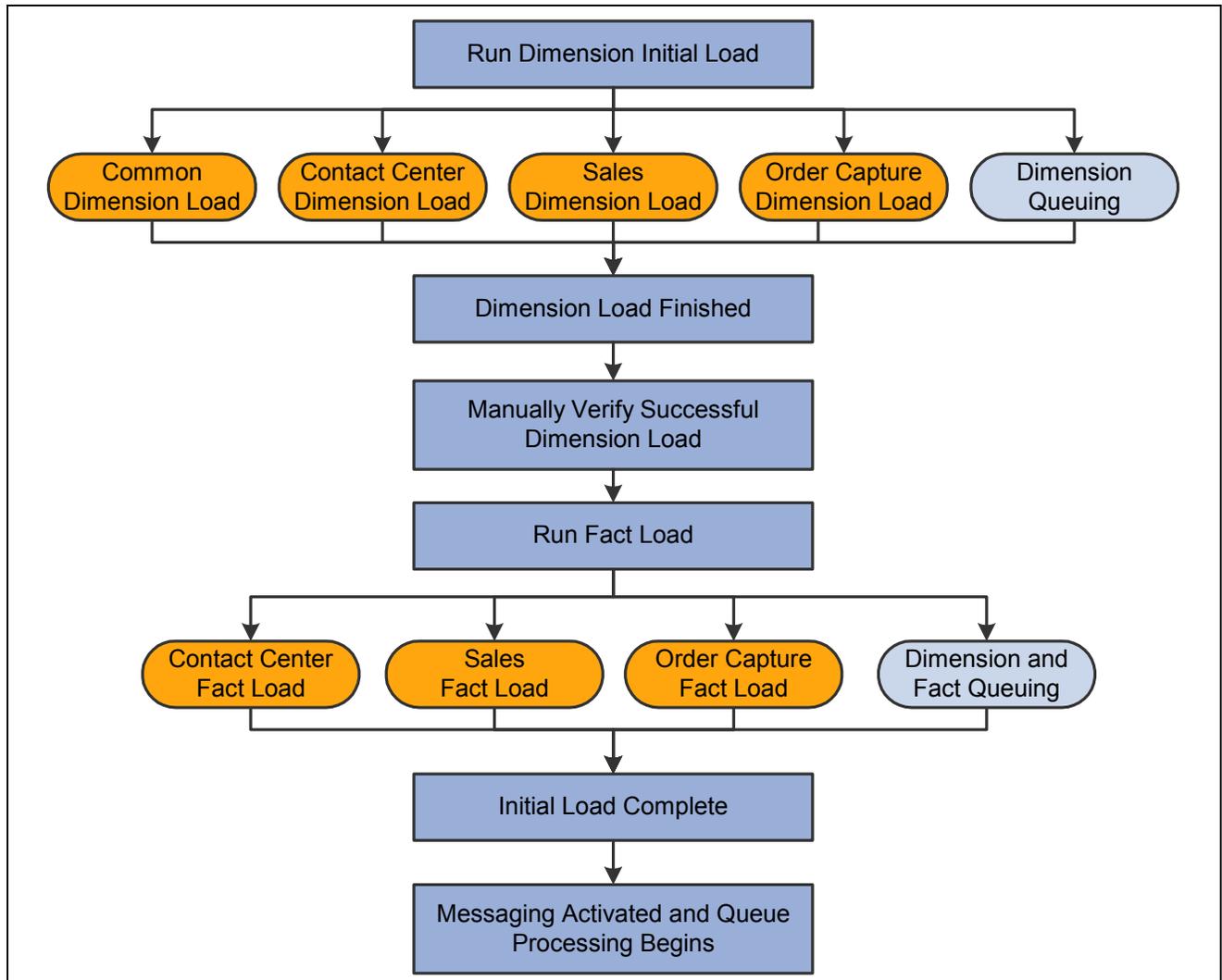
Message Suppression During the Initial Data Load

Before the initial data load begins sending data to the dashboard system, it activates a setting that suppresses messaging. Any online changes that are made during the initial load process are still queued, but the queue contents are not sent to the dashboard system. Messaging is reactivated only after the process finishes loading both dimensions and facts.

Suppressing messaging during the data load offers significant performance benefits because data arrives in the dashboard system in the right order. Essentially, the initial load sends a data snapshot from a specific point in time, and any changes that users make after that point in time get held up in the queue until all data from that snapshot has arrived.

Because the initial data load includes all data as of the time the initial load process starts, dimension queuing and fact queuing begin at different times. Dimension queuing starts when you start the dimension data load, but fact queuing doesn't start until you begin the fact data load.

This diagram illustrates how messaging and queuing work during the initial data load:



Messaging during the initial data load

Errors while loading data for one dashboard application do not affect the data loads for the other dashboard applications, but they will prevent the process from switching the message suppression setting. This means that if there is an error during one application's load, messaging will remain suppressed for all applications until you resolve the error and rerun the initial data load for the application that had the error.

Note. The installation documentation for CRM dashboard applications describes how to run a delivered script that switches the message suppression setting. You might use this script if, for example, you are doing a phased implementation and you don't want your already-active contact center dashboard to stop receiving messages while you perform the initial data load for your sales dashboard. However, overriding message suppression can significantly degrade the performance of the initial data load and is not recommended.

See Also

Oracle BAM Installation Guide

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, "Setting Up the Dashboard"

Data Objects for Dimensions

After you run the process to load dimension data, you must manually access the ADC and verify that the dimension data is completely loaded before you then load fact data. This section lists the dashboard data objects that you must manually verify.

Common Dimensions

These data objects are all under Data Objects/Common:

- Business Unit
- Contact
- Country
- Currency
- Currency Rate
- Current Currency Rate
- Customer
- Department
- Email Template
- Installation Options
- Location
- Partner
- Person
- Product Group
- Product Item
- Provider Group
- Region
- Set ID Indirection
- State
- Task Priority
- Task Type
- Unit of Measure
- Provider Agent

Contact Center Dimensions: Cases

These data objects are all under Data Objects/Services:

- Agreement
- Case Impact
- Case Priority
- Case Relationship

- Case Severity
- Case Source
- Case Status
- Case Subtype
- Case Type
- Case Vertical
- Category
- Specialty Type
- Detail
- Problem Type
- SLA Response Indicator
- SLA Restore Indicator

Contact Center Dimensions: Emails

These data objects are all under Data Objects/Services:

- Email and Interaction Status
- Email Detail Status
- Email Mood
- Email Priority
- Email Process State
- Email Queue
- Email System Definition
- Email Template Category
- Email Template Type
- Email Work list
- Email Work list Member
- Language
- Mail Box
- Package Definition

Contact Center Dimensions: Interactions

These data objects are all under Data Objects/Services:

- Interaction Type
- Sub Interaction Type

Sales Dimensions

Except where otherwise noted, these data objects are under Data Objects/Sales Setup Tables.

- Account
- Account Plan Status
- Account Plan Type
- Account Team
- Account Activity Flags

This data object is located under Data Objects/Sales

- Fallout Reason
- Forecast Type
- Industry
- Lead Rating
- Lead Reject Reason
- Lead Source
- Lead Status
- Marketing Campaign
- Opportunity Status
- Pipeline Segment
- Revenue Type
- Sales Priority
- Sales Stage
- Sales User
- Task Status
- Territory
- Timeframes Annual
- Timeframes Quarterly

Order Capture Dimensions

These data objects are under Data Objects/Order Capture:

- Activity Definition
- Business Project
- Capture Type
- Carrier
- Header Status
- Hold Definition
- Hold Status
- Line Status
- Order Source

- Task

Summary Table Data

The dashboard system uses separate data objects to store summary and detailed information about transactional objects. The messaging framework moves data from the PeopleSoft system into detail tables in the dashboard system. Enterprise Link plans read information from the detail tables and populate the summary tables.

Summary tables are loaded from data that already exists into the active data cache (ADC). Depending on the type of summary data involved, the plan that populates the summary table is scheduled to run daily, weekly, or monthly. The source for the daily plan is the transaction fact table. The daily fact table is the source for the weekly and monthly plan. All summary facts are available for all CRM data sources.

Since the daily plan retrieves data for the previous day, it should be scheduled to run sometime after midnight so your dashboards receive data for the entire day. Likewise, the weekly plan retrieves data for the previous week and the monthly plan retrieves data for the previous month.

Weekly and monthly plans must run after the daily plan since as they use the daily fact table as their source of information. These plans use a report as the data source. The report is used to filter only the data desired for each plan.

Data Deletion Plans

During your initial data load, you can load data for a specific period of time—for example, you can load 3 months of case data into the ADC. As the dashboard is used, data builds up over time. To purge the ADC of old data, you need to run deletion plans on a regular basis. For example, in PeopleSoft Support (Services) to maintain a rolling three months of case data, use the deletion plan for cases to delete anything older than three months.

Deletion plans use a report as the source. The reports filters the data that needs to be deleted. PeopleSoft CRM delivers deletion plans with time frames that correspond to the default settings for the initial data load. If you change the initial setting, then you need to make a parallel change in the appropriate deletion plan.

To change the number of days on a report that a deletion plan uses to delete data:

1. Launch Oracle BAM Active Studio (the report- and alert-building tool within Oracle BAM) .
2. Click Shared Reports, Cross Release, Hidden.
3. Select the report that you want to edit (for example *System - Help Desk Case Weekly*).
4. Click Edit, Edit View, Filter.
5. Click the Filter Expression that you want to edit (for example, *Week is equal to field ReportWeek*).

Alerts allow the scheduling of the plans. PeopleSoft, however, delivers these plans as disabled. It is important to note that there is no initial load for these fact tables. The end-user interface does not have a page for setting up alerts. To define alerts, use Oracle BAM Active Studio.

Note. To view a list of the plans, alerts and reports that PeopleSoft delivers to facilitate the deletion of data, refer to the appendix in this PeopleBook for the dashboard application that you are using. Initial load pages are explained in the documentation for dashboard integration framework.

See Also

Oracle BAM Active Studio User's Guide

[Appendix C, “Contact Center Dashboard Objects,” page 173](#)

[Appendix B, “Order Capture Dashboard Objects,” page 169](#)

[Appendix A, “Sales Dashboard Objects,” page 165](#)

Defining Application-Specific Data Load Options

To define application-specific data load options, use the Initial Load Options (RBD_LOAD_OPTIONS) component.

This section discusses how to:

- Define initial data loads options for the PeopleSoft Contact Center.
- Define initial data load options for PeopleSoft Order Capture.
- Define initial data load options for PeopleSoft Sales.

Note. You must define your initial data load options before running the initial load.

Pages Used to Define Initial Data Load Options

Page Name	Object Name	Navigation	Usage
Dashboard Initial Load - Contact Center	SDB_INIT_LOAD	Set Up CRM, Product Related, Dashboard, Initial Load Options, Contact Center	Define initial data load options for cases, interactions, and emails data from the PeopleSoft CRM database.
Dashboard Initial Load - Order Capture	OCD_INIT_LOAD	Set Up CRM, Product Related, Dashboard, Initial Load Options, Order Capture	Define initial data load options for order data from the PeopleSoft CRM database.
Dashboard Initial Load - Sales	RSFD_INIT_LOAD	Set Up CRM, Product Related, Dashboard, Initial Load Options, Sales	Define initial data load options for leads, opportunities, forecasts and tasks from the PeopleSoft CRM database.

Defining Initial Data Load Options for the PeopleSoft Contact Center

Access the Dashboard Initial Load - Contact Center page.

Dashboard Initial Load - Contact Center page

All open Cases will be loaded

Display only field that shows that the initial load will include all open cases. PeopleSoft delivers this field as display only to make sure you load all open cases into the ADC.

Cases Closed in the last period (Days)

Select this check box to load all cases that were closed within a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.

Interactions created in the last period (Days)

Select this check box to load all interactions from a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.

All open Emails will be loaded

Display only field that shows that the initial load will include all open emails. PeopleSoft delivers this field as display only to make sure you load all open emails into the ADC.

Emails closed in the last period (Days)

Select this check box to load closed emails from a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.

Defining Initial Data Load Options for PeopleSoft Order Capture

Access the Dashboard Initial Load - Order Capture page.

Dashboard Initial Load - Order Capture page

Load all orders in the Business Process

Display only field that shows that the initial load will include all orders that are in the process of being completed. PeopleSoft delivers this field as display only to make sure you load all incomplete orders into the ADC.

Load completed orders (in days)

Select this check box to load completed orders into the ADC. In the unlabeled field to the right, indicate the number of days, going backwards, from which you want to load completed order information.

Defining Initial Data Load Options for PeopleSoft Sales

Access the Dashboard Initial Load - Sales page.

The screenshot shows the 'Dashboard Initial Load' configuration page for the Sales module. It features four sections, each with a checked checkbox for loading all items and an unchecked checkbox for loading items from a specific time period (Days), with a text input field set to '0':

- Lead:**
 - All Leads that are not closed or converted will be loaded
 - Leads created in the last period (Days) [0]
- Opportunity:**
 - All open Opportunities will be loaded
 - Opportunities created in the last period (Days) [0]
- Forecast:**
 - Forecast created in same timeframe of the last period (Days) [0]
- Task:**
 - All open and in progress Tasks will be loaded
 - Task created in the last period (Days) [0]

Dashboard Initial Load - Sales page

Note. The defaulted fields on this page will load all leads, opportunities, and tasks for the timeframes that you have in your system. The system loads all open opportunities with an estimated close date, even if there is no estimated revenue. It also loads all leads regardless of the fact that there may be no estimated revenue attached to the lead.

If you have a large number of timeframes (over 2 years worth) within your current PeopleSoft Sales application, use the second option to limit the amount of data that the system will pass to the dashboard application. Enter the number of days in the corresponding fields for each type of data. To help improve performance, PeopleSoft CRM suggests that you load no more than 1 year’s worth of data (365 days) using this page.

All Leads that are not closed or converted will be loaded

Display only field that shows that the initial load will include all leads that are not closed or converted. PeopleSoft delivers this field as display only to make sure you load all open leads into the ADC.

Leads created in the last period (Days)

Select this check box to load all leads that were created within a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.

All open Opportunities will be loaded	Display only field that shows that the initial load will include all open opportunities. PeopleSoft delivers this field as display only to make sure you load all open opportunities into the ADC.
Opportunities created in the last period (Days)	Select this check box to load all opportunities that were created within a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.
Forecast created in same timeframe of the last period (Days)	Select this check box to load all forecasts that were created within a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.
All open and in progress Tasks will be loaded	Display only field that shows that the initial load will include all open and in progress tasks. PeopleSoft delivers this field as display only to make sure you load all open and in progress tasks into the ADC.
Task created in the last period (Days)	Select this check box to load all tasks that were created within a specified time period into the ADC. Indicate the number of days in the unlabeled field to the right.

Running the Initial Data Load Process

This section discusses how to run the initial data load process.

Prerequisite

Before running the initial data load process, you must complete the Installation Options page.

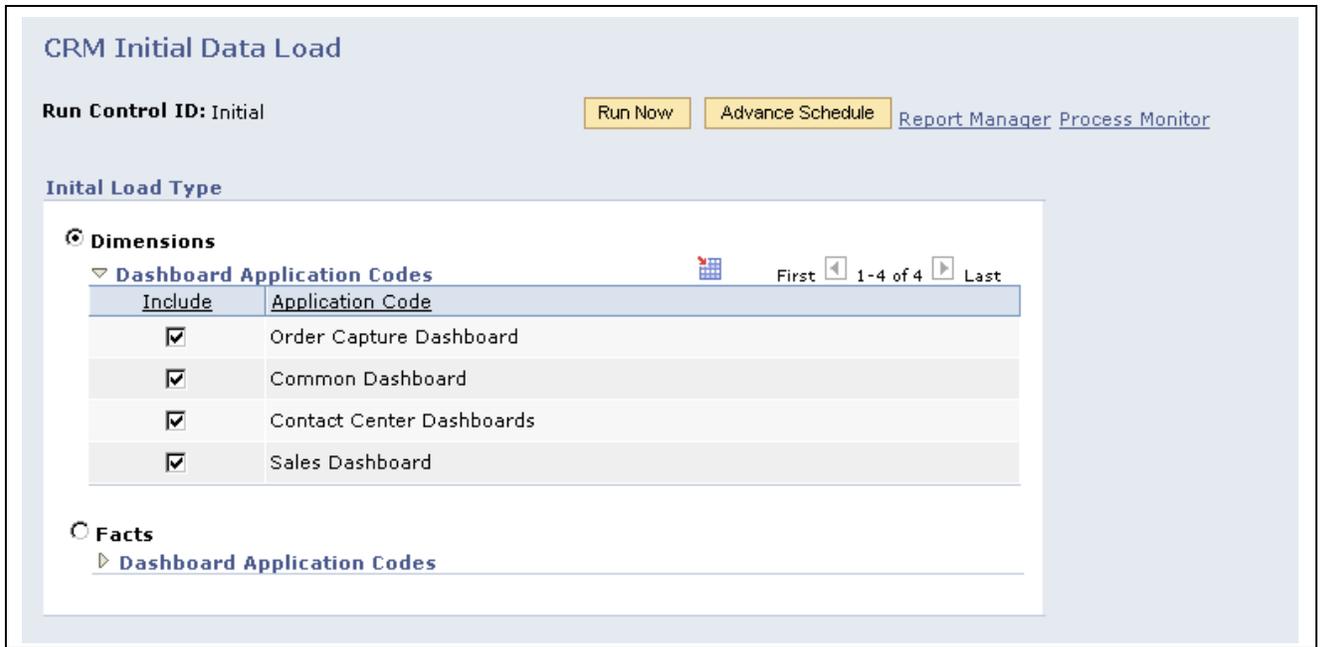
See *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook*, “Setting Up the Dashboard,” Defining System Settings.

Page Used to Run the Initial Data Load

Page Name	Object Name	Navigation	Usage
Sequential Initial Load	RBD_INITIAL_LOAD	Set Up CRM, Product Related, Dashboard, CRM Initial Data Load, CRM Initial Data Load	Run the initial load process for CRM dashboard applications

Running the Initial Data Load Process

Access the CRM Initial Data Load page.



CRM Initial Data Load page

Run Now and Advance Schedule

Click one of these buttons to run the CRM Initial Data Load (RBD_INIT_DRV) Application Engine process. This process loads data for the selected applications.

Dimensions

Select this option to load dimension data for the dashboards that you select from the related Dashboard Application Codes grid. Select one or more of these dashboards: Order Capture Dashboard, Common Dashboard, Contact Center Dashboards, and Sales Dashboard.

The Contact Center Dashboards includes the dashboards for PeopleSoft Support (Services), HelpDesk, and HelpDesk for Human Resources.

You must load dimensions for the common dashboard as well as for the specific dashboard applications you use before you can load the facts for the application dashboards. This means that you should always select Common Dashboard unless you have loaded the common dashboard dimensions during a previous run of the initial data load process.

For example, you can omit the common dashboard dimensions if you are adding an additional dashboard application to an existing dashboard installation, or if the common objects were successfully loaded but one or more applications failed during a previous attempt to perform the initial data load.

Facts

Select this option to load fact data for the dashboards that you select from the related Dashboard Application Codes grid. Select one or more of these dashboards: Order Capture Dashboard, Contact Center Dashboards, and Sales Dashboard.

CHAPTER 5

Using the PeopleSoft Enterprise Sales Dashboard

This chapter provides overviews of the sales dashboards and sales dashboard data and discusses how to:

- Set up sales targets.
- Use the summary page to access discovery reports for PeopleSoft Sales.
- Use the forecast management discovery dashboard pages.
- Use the pipeline quality and health discovery dashboard pages.
- Use the account management discovery dashboard pages.
- Use the sales team performance discovery dashboards pages.
- Execute actions from the sales dashboard discovery pages.

Understanding the Sales Dashboard

This section discusses:

- Sales dashboard perspectives
- Terminology
- Actions
- Reports

Sales Dashboard Perspectives

The PeopleSoft Sales Dashboard enables front-line sales managers to monitor, discover, and act on current operational sales data. Most of the displays and lists built into the Sales Dashboard application also work for higher level managers. The Sales Dashboard enables the sales manager to gain a perspective on the information in the PeopleSoft Sales transaction system, as it is primarily focused on everyday activities.

The Sales Dashboard, however, can provide summaries and analysis which are more difficult to obtain from the PeopleSoft CRM Sales application itself.

These four sets of perspectives within the Sales Dashboard can help sales managers run their operations more effectively:

- Forecast Management
 - Provides current and accurate forecast information to help managers avoid missing revenue targets for current plan periods.
- Pipeline Quality and Health

Provides data on the volume and quality of opportunities in the pipeline to help increase revenue.

- Account Management

Tracks goal accomplishment. Also optimizes time and attention paid to accounts to help assist in better account plan management, including setting goals such as increased revenue and customer satisfaction.

- Sales Team Performance

Provides up-to-date resource allocation and alignment information to help sales managers achieve greater sales force productivity and release independence.

Note. Since dashboard components are built to a standard format, the data structures underlying the displays are mostly common and reused as needed.

Terminology

These common terms are discussed in this chapter:

Term	Definition
Timeframe	A grouping of periods, such as months in a year. For example: <i>Year 2004</i> .
Period	The periods in the timeframe. For example: a month, as in <i>June</i> .
Timeframe Period	Timeframe may, at times, be used as shorthand for <i>TimeframePeriod</i> .
Pipeline	While a forecast is specific in amount and date, <i>pipeline</i> refers to all sales opportunities that are currently open. One consideration is whether there is a desirable mix of opportunities across all stages of the sales cycle.

Actions

This table describes the sales-related actions you can execute from the Sales Dashboard application:

Action	Type	Description
Add Account Task	Account	Adds an account task for a selected account.
Add Reps to Account	Account	Adds representatives to selected accounts.
Notify Reps to Engage With Account	Account	Sends emails to representatives to engage with accounts.
Replace Rep On Account	Account	Replaces account representatives for selected accounts.
Add Opportunity Task	Opportunity	Adds tasks to opportunities.
Add Reps to Lead	Lead	Adds representatives to selected leads.
Add Reps To Opportunity	Opportunity	Adds representatives to selected opportunities.
Add Sales Rep Task	Task	Adds tasks for selected sales representatives.

Action	Type	Description
Email High Performer Sales Rep	Email	Sends emails to high performing sales representatives.
Email Opportunity Primary Rep	Email	Sends emails about opportunities to primary sales representatives.
Opportunity Drill to PIA	Opportunity	Provides access to the opportunity page in PeopleSoft Sales from the Sales Dashboard application.
Reassign Lead	Lead	Assigns selected leads to different primary representatives.
Reassign Opportunity	Opportunity	Assigns selected opportunities to different primary representatives.
Update Lead Priority	Lead	Change the priority of selected leads.
Update Opportunity Priority	Opportunity	Change the priority of selected opportunities.

Summary Report Page

The Sales Summary report displays these sections with links to the various discovery report pages:

Section	Description
Forecast Management	Provides target, actual and attainment percentages for actual attainment of forecasted revenue, forecasted revenue as a percentage of plan, and revenue win ratio.
Pipeline Quality and Health	Provides target, actual and attainment percentages for pipeline health percentages and estimated revenue.
Account Management	Provides target, actual and attainment percentages for attainment of plan goals, average revenue per account, and account touch ratio.
Sales Team Performance	Provides target, actual and attainment percentages for quota attainment percentage, active opportunities, and lead conversion ratios.
My Received Alerts	Provides a list of messages that the dashboard system sends to users when predefined conditions are met.

The Sales Summary page displays these two reports:

Report	Description
Forecast Detail	This report displays information that compares forecasted to actual revenue attained for the selected category.
Team Metrics	This report displays information about lead conversion ratios, account touch rate, and the percentage of quota attained by sales representative.

Discovery Report Pages

This section discusses the available discovery reports and views.

Forecast Attainment

This table lists the views that pertain to the attainment of forecasted revenue versus actual attainment of revenue:

- Forecast Detail
- Forecast Compare
- Opportunity Performance
- Recent Opportunity Changes

Forecast as Percentage of Plan

This table lists the views that pertain to the attainment of revenue targets with respect to forecasts and quotas:

- Forecast Detail
- Forecast Revenue Compare
- Opportunity Performance
- Recent Opportunity Changes

Revenue Win Rate

This table lists the views that pertain to the attainment won revenue versus lost revenue:

- Win vs. Loss
- Revenue Conversion
- Open Opportunities
- Loss Analysis

Estimated Revenue

This table lists the views that pertain to pipeline estimated revenue, forecast revenue and quota by quarter:

- Pipeline Coverage
- Campaign Revenue
- Won vs. Loss
- Loss Analysis

Pipeline Health

This table lists the views that pertain to value comparisons that compare estimated revenue to pipeline targets:

- Pipeline Distribution
- Pipeline Funnel by Revenue
- Deal Health
- Lead Volume

Attainment of Plan Goals

This table lists the views that pertain to the comparison of exceeded goals and total goals, which are expressed in percentages:

- Goal Attainment
- Total Goal Attainment
- Account Activity
- Goal Attainment Analysis

Average Revenue per Account

This table lists the views that pertain to the average closed-won revenue based on opportunity data:

- Average Revenue
- Total Revenue Analysis
- Revenue Won/Lost
- Account Revenue

Account Activity Rate

This table lists the views that pertain to the number of activity types per sales representative and the number of accounts to activity coverage:

- Account Activity by Rep
- Total Activity Count
- Accounts Without Activity
- Account to Activity Coverage

Lead Conversion Rate

This table lists the views that pertain to number of leads by lead status:

- Lead Quality
- Lead Quality Compare
- Work Distribution
- Average Lead Response Days

Watch List Opportunity Rate

This table lists the views that pertain to items on the priority watch list which meet certain conditions:

- Priority Watch
- Priority Watch Historical
- Top Deals Missing from Watch List
- Open Tasks by Due Date

Quota Attainment Percentage

This table lists the views that pertain to opportunity revenue:

- Opportunity Revenue
- Opportunity Revenue Compare
- Team Metrics
- Average Lead Response Days

Understanding Sales Dashboard Data

This section discusses:

- Dashboard data.
- Trigger points.
- Historical data.
- Timeframes.

Dashboard Data

These data types are uploaded from the CRM database into the Sales Dashboard:

- Forecast detail
- Opportunity

For opportunity data to be sent to the dashboard application, the estimated close date must be populated for open opportunities. Opportunities must be assigned and the estimated close date (or actual date for closed opportunities) must fall within a valid sales timeframe.

- Open forecast
- Opportunity competitor
- Lead

For lead data to be sent to the dashboard application, the lead and opportunity must be assigned. In addition, the lead creation and last update date must fall within a valid sales timeframe.

- Account plan

Only active and completed plans are sent to the dashboard application.

- Tasks
- Call reports

To support dashboard displays, certain transformations are done within the dashboard. Data is grouped around core tables, which are used for the reports. This layout of table relationships helps shape expectations of their usage within the reports. One example is that the lookup for opportunity name uses the Opportunity Header data object.

The Touch data object contains data from various entities (for example, leads, opportunities, tasks, call reports, and account plans).

Since dashboard reporting does not directly use the begin and end dates to filter displays, the system loads or attaches timeframes within the tables for opportunities, leads, and so on.

This process represents the field data that the system loads. Data structure and usage, however, may evolve beyond the creation of these fields, which are generated within the dashboard by data transformations.

Dynamic Trigger Points

This table lists all the sales-related trigger points that are imbedded in the Sales Dashboard. These trigger points are updated in near real time.

Data Object	Trigger Point	Trigger Details
Account Opportunity	Updated through dependent trigger.	None
Opportunity Header	Save of opportunity header.	When any records in the RSF_OPPORTUNITY component change.
Opportunity Sales Rep	Save of header or rep.	When any records in the RSF_OPPORTUNITY component change.
Opportunity Forecast	Save of header, rep, or forecast.	When any records in the RSF_OPPORTUNITY component change.
Opportunity Competitor	Save of header, rep, or competitor.	When any records in the RSF_OPPORTUNITY component change.
Manager Aggregate	Changes to territory tree access.	When any records in the RSF_OPPORTUNITY, RSF_REV_ENTER, or RSF_SHADOW_ENTER components change.
Call Report	Save	When any records in the RD_CALL_REPORT component change.
Forecast Detail	Save	When any records in the RSF_REV_ENTER and RSF_SHADOW_ENTER components change.
Pipeline Segment Quota	Save	When any changes to the RSF_QS grid on the RSF_SUSER component are saved.
Task	Save	When any records in the RB_TSK component change.
Lead	Save	When any records in the RSF_LEAD_ENTRY component change.

Data Object	Trigger Point	Trigger Details
Pipeline By Manager	Save	When any records in the RSF_SUSER component change.
Account Planning	Save	When any records in the RSP_PLANNING component change.
Touch	Updated through dependent trigger.	None

Static Trigger Points

These trigger points use the setup pages for which the data does not change very often and are run during installation for initial setup.

Data Object	Trigger Point	Trigger Details
Sales Manager Access	Run RSF_ACCESS Application Engine.	Application Engine step.
Account Manager Access	Run RSF_ACCESS Application Engine.	Application Engine step.
Marketing Campaign	Save on campaign detail.	When the RA_CAMPAIGN_DETAIL component is saved.
Account Plan Base	Updated through dependent trigger.	None
Account	Any name or account team change.	When the name of a consumer, partner, or customer is updated in the account name using the RBD.Person, RBD.Customer and RBD.Partner plans.
Account Team	Any name or account team change.	The CDM application class writes data to the queue table.
Pipeline Segment	Component save.	When the RSF_SEGMENT component is saved.
Sales Stage	Component save.	When the RSF_SALES_MODEL component is saved.
Lead Rating	Component save.	When the RSF_LEAD_RATING component is saved.
Lead Reject Reason	Component save.	When the RSF_LEAD_RJCT_RSN component is saved.
Lead Source	Component save.	When the RSF_LEAD_SOURCE component is saved.
Fallout Reason	Component save.	When the RSFD_FALLOUT_RSN component is saved.

Data Object	Trigger Point	Trigger Details
Forecast Type	Component save.	When the RSF_FCAST_TYPE component is saved.
Industry	Component save.	When the RSF_INDUSTRY component is saved.
Revenue Type	Component save.	When the RSF_REV_TYPE component is saved.
Sales User	Component save.	When the RSF_SUSER component is saved.
Territory	Component save.	When the RSF_TERRITORY component is saved.
Timeframes Annual	Component save.	When the RSF_TF component is saved.
Timeframes Quarterly	Component save.	When the RSF_TF component is saved.
Account Plan Type	Component save.	When the RSP_PLAN_TYPE component is saved.
Account Plan Status	Initial data load.	None
Lead Status	Initial data load.	None
Opportunity Status	Initial data load.	None
Task Status	Initial data load.	None
Sales Priority	Initial data load.	None
Day Count	System data.	None
Touch Type	System data.	None
Sales Targets	System data.	None

Historical Data

Reports are primarily based on current data elements. Most of the pages include a graph based on historical information, which is meant to provide a certain perspective. These historical depictions of your operation are *not* based upon retaining all data indefinitely.

The intention is to capture particular snapshots or small summaries of information. These snapshots represent a particular moment in time, typically at the end of a timeframe.

These summaries are unique to at least the individual sales representative and can be summarized for a common manager or filtered back to a specific sales representative:

- *Opportunity Status - Historical*

At the end of a timeframe, the system summarizes the estimated revenue by sales representative and by status for all opportunities in either a closed status with an actual close date within the timeframe or in an open status with an estimated close date within the timeframe.

- *Forecast Success*

At the end of the timeframe, the system summarizes the actual revenue for each sales representative as allocated by the allocation percent for all opportunities in a closed-won status with an actual close date within the timeframe. As of the end of a timeframe, the system summarizes the opportunity forecast of the estimated revenue for each sales representative as allocated by the allocation percent for all opportunities in a closed-won status with an actual close date within the timeframe. The quota amount is by person ID. The system summarizes forecast details from revenue by person ID for forecasts made at the beginning of a timeframe period.

- *Closed-Won-Lost*

At the end of a timeframe period, the system summarizes estimated revenue by sales representative, by forecast type, by closed-won status, or by closed-lost status for all opportunities with actual close dates within the timeframe.

- *Pipeline Coverage*

The system saves the quota amount for each representative for the timeframe period. It also summarizes forecast details from revenue for each sales representative as of the beginning of the period, summarizes actual revenue for each sales representative as of the end of the period, and then summarizes estimated revenue for each sales representative (allocated) for all opportunities open as of the beginning of the period and not closed as of the beginning of the period. You must use the Opportunity Sales Representative (OppSalesRep) record to allocate sales revenue to the representatives. The system summarizes estimated revenue for each sales representative (allocated) for all opportunities open before the end of a period and not closed as of the end of a period.

- *Lead Generation Revenue*

The system summarizes by sales representative the estimated revenue for leads originated within the timeframe period, the estimated revenue for leads accepted within the period, the estimated revenue for opportunities (leads converted to opportunities) within the period that have a lead ID, and the actual revenue for opportunities that are either closed or won within a period that have a lead ID.

- *Lead Generation Counts*

The system counts by sales representative the leads originating within the timeframe period, the leads accepted within the period, the opportunities that have a lead ID, and the opportunities closed and won within the period that have a lead ID.

- *Pipeline*

The system summarizes by salesperson the estimated revenue per segment for all open opportunities as of the period end. The summarization is based on an allocation from the Opportunity Sales Rep data object (RSF_OPP_SLSREP). The corresponding segment quotas are also saved.

- *Account Attainment History*

The system calculates, for each account with a plan, the goal attainment status as of the end of a timeframe period. Each goal for an account is converted into a percent. Therefore, a goal to create X leads this period is evaluated against attainment. The attainment for all of the goals is added together and divided by the count to achieve a particular percent. For example, if the four goals are 125 percent, 90 percent, 120 percent, and 50 percent, then the account would have a 96 percent average attainment ($(125 + 90 + 120 + 50) / 4 = 96$).

- *Revenue Distribution*

At the end of each period, the system creates revenue quartiles for each account representative. The quartiles are created by taking the largest revenue account (the sum of all closed-won opportunity actual revenue) and dividing that number by four. For example, if the largest account had three opportunities that were closed-won in the period, and these had a total of 1,240,000 USD in actual revenue, then the quartiles would be:

- 1st quartile: All accounts with more than 930,000 USD in closed-won.
- 2nd quartile: All accounts with less than 930,000 USD and more than 620,000 USD.

Note. The system then summarizes revenue for all accounts within the quartile. A quartile name should exist to indicate the boundaries (for example >930,000 USD).

- *Account Activity by Rep*

The system summarizes, by representative, a count of each activity type across all of the representative's accounts. The system determines the total for that type across all representatives and the percentage for each representative. If the account is shared, then the system allocates partial counts using these rules:

- If any sales users (RSF_SUSER) are representatives, then no non-sales users get a count.
- Among the remaining representatives, if any account owner representatives exist, then all counts are divided evenly among them.
- If no account owner representatives exist, the count is divided among all remaining representatives evenly.

Counts are stored by representative, activity, and percent.

Timeframes

Before you can use the Sales Dashboard application, you must set up quarterly and annual timeframes in your PeopleSoft Enterprise Sales application. You must setup at least three timeframes for the Sales Dashboard application:

- Current quarter
- Next quarter
- Current annual timeframe

You will need to create additional timeframes as you move from one quarter to the next, and from one year to the next. The system does allow the timeframes to be setup in advance; so, for example, you may want to set up the next 4 quarters in advance, so that you don't need to wait for the end of each quarter to setup the next set of timeframes.

To set up timeframes, select Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Time Frames

See Also

PeopleSoft Enterprise CRM 9 Application Fundamentals PeopleBook, "Defining Holiday Schedules," Defining Holiday Schedules, Time Frames, and Sales Quota Rollups

Setting Up Sales Targets

This chapter discusses how to set up sales targets.

Page Used to Set Up Sales Targets

Page Name	Object Name	Navigation	Usage
Setup - Sales Targets	Setup - Targets	Click My Dashboard, Sales Targets.	Establish targets and thresholds that you want the system to use when calculating information to display on the various discovery pages for PeopleSoft CRM Sales. Use this page to specify targets such as percentages for attainment of plan goals, pipeline health, quota attainment, revenue, lead conversion, win rates, and so on.

Setting Up Sales Targets

Access the Setup - Sales Targets page.

Setup - Sales Targets										
Target Values										
% Attainment of Plan Goals	% Pipeline Health (Next Quarter)	% Quota Attainment	Account Activity Days	Account Activity Rate	Average Revenue per Account	Historical Pipeline Conversion Rate	Lead Conversion Rate	Revenue Win Rate	Opportunity Activity Rate	Opportunity Activity Days
0.90	4.00	0.90	5	0.50	4,000,000.C	0.60	0.60	0.75	0.75	5
0.90	4.00	0.90	5	0.50	4,000,000.C	0.60	0.60	0.75	0.75	5
0.90	4.00	0.90	5	0.50	4,000,000.C	0.60	0.60	0.75	0.75	5
0.90	4.00	0.90	5	0.50	4,000,000.C	0.60	0.60	0.75	0.75	5

Setup - Sales Targets page

Use the fields on this page to set up the targets and thresholds that you want the system to use to display dashboard information about sales representatives, opportunities, accounts, leads, revenue, and win rates that you are managing.

The system uses the numbers that you enter to calculate and display information on the discovery pages.

You can use this information to monitor the current status of your sales organization and the efficiency with which you sell and maintain your business relationships.

Using the Summary Page to Access Discovery Reports for PeopleSoft Sales

This section discusses how to use the Sales Summary page to view discovery reports for PeopleSoft CRM Sales.

Page Used to Access Discovery Reports for PeopleSoft Sales

Page Name	Object Name	Navigation	Usage
Sales Summary	Summary - Sales	Click My Dashboards, Sales Summary.	View real-time information related to the operation of the your PeopleSoft CRM Sales application.

Using the Summary Page to Access Discovery Reports for PeopleSoft Sales

Access the Sales Summary page.

The screenshot displays the 'Sales Summary' page with the following data tables:

Metric	Target	Actual	Attainment
Forecast Attainment	0	0	0%
Forecast as % of Plan	100%	0%	0%
Revenue Win Rate	75%	0%	0%

Metric	Target	Actual	Attainment
Pipeline Health Percentage	400%	0%	0%
Estimated Revenue	0	0	0%

Metric	Target	Actual	Attainment
No values exist for Attainment of Plan Goals			
Average Revenue per Account	4,000,000	0	0%
Account Activity Rate	50%	1%	1%

Metric	Target	Actual	Attainment
Quota Attainment Percentage	90%	0%	0%
No values exist for Active Opportunities			
Lead Conversion Rate	60%	0%	0%

DateTime	Subject
5/18/2006 1:52:13 PM	100 % of all orders are in Check Shipment

Sales Summary page

Note. In all of the metrics described in this section the variance is the actual number divided by the target number. If the message “No values exist for XXXXX” appears on the Summary page, the system could not find the value of next quarter for the corresponding view. To avoid this situation, make sure your timeframes include future quarter.

Forecast Management

This section displays information about the actual attainment of forecasted sales data, the forecast as a percentage of plan, and the win ratio for revenue. For the Actual Attainment of Forecast metric, the target is the forecast of revenue for the timeframe and the actual is the closed-won opportunity revenue total. For the Forecast as % of Plan metric, the target is 100 percent (default) and the actual is forecasted revenue divided by the quota. For the Revenue Win Rate metric, the target is 100 percent (default) and the actual is the closed-won revenue divided by all closed revenue.

Pipeline Quality and Health

This section displays information about pipeline health and estimated revenue. For the Pipeline Health Percentages metric, the target is 100 percent (default), the actual is the pipeline revenue divided by the quota revenue. For the Estimated Revenue metric, the target is the revenue for the timeframe quota minus the revenue for the closed-won timeframe and the actual is the pipeline revenue for the timeframe multiplied by the conversion rate for one year previous to the current date.

Account Management

This section displays information about the attainment of goals, the average revenue per account, and the account touch ratio. For the Attainment of Plan Goals metric, the target is the average revenue by business unit as percentage and the actual is the attained revenue divided by the possible percentage of the account goal plan. If the attainment percentage is greater than or equal to 100, then it is included in the success count which is divided by the overall count. For the Average Revenue per Account metric, the target is the average revenue which is grouped by account, and the actual is the sum of the actual revenue divided by the distinct count. For the Account Activity Rate metric, the target is the average account activity ratio and the actual is the recent account activity divided by all account activity.

Sales Team Performance

This section displays information about quota attainment for the sales representatives, active opportunities, and the lead conversion ratio. For the Quota Attainment Percentage metric, the target is the average of all sales targets and the actual is the quota divided by the actual attainment, which is grouped by manager. For the Watch List Opportunity Activity Rate metric, the target is the average watch list opportunity touch ratio and the actual is the sum of the recent touches being watched divided by the number of all opportunities. For the Lead Conversion Ratio metric, the target is average lead conversion ratio and the actual is the sum of the leads converted divided by the number of lead IDs.

My Received Alerts

Provides a list of messages that the dashboard system sends to users when predefined conditions are met. Alerts do not necessarily demand action, they simply notify the user of a situation. It is then up to the user to respond appropriately.

Forecast Detail

This view displays information that compares forecasted to actual revenue attained for the selected category.

Team Metrics

This view displays information about lead conversion ratios, account touch rate, and the percentage of quota attained by sales representative.

Using the Forecast Management Discovery Dashboard Pages

This section discusses how to:

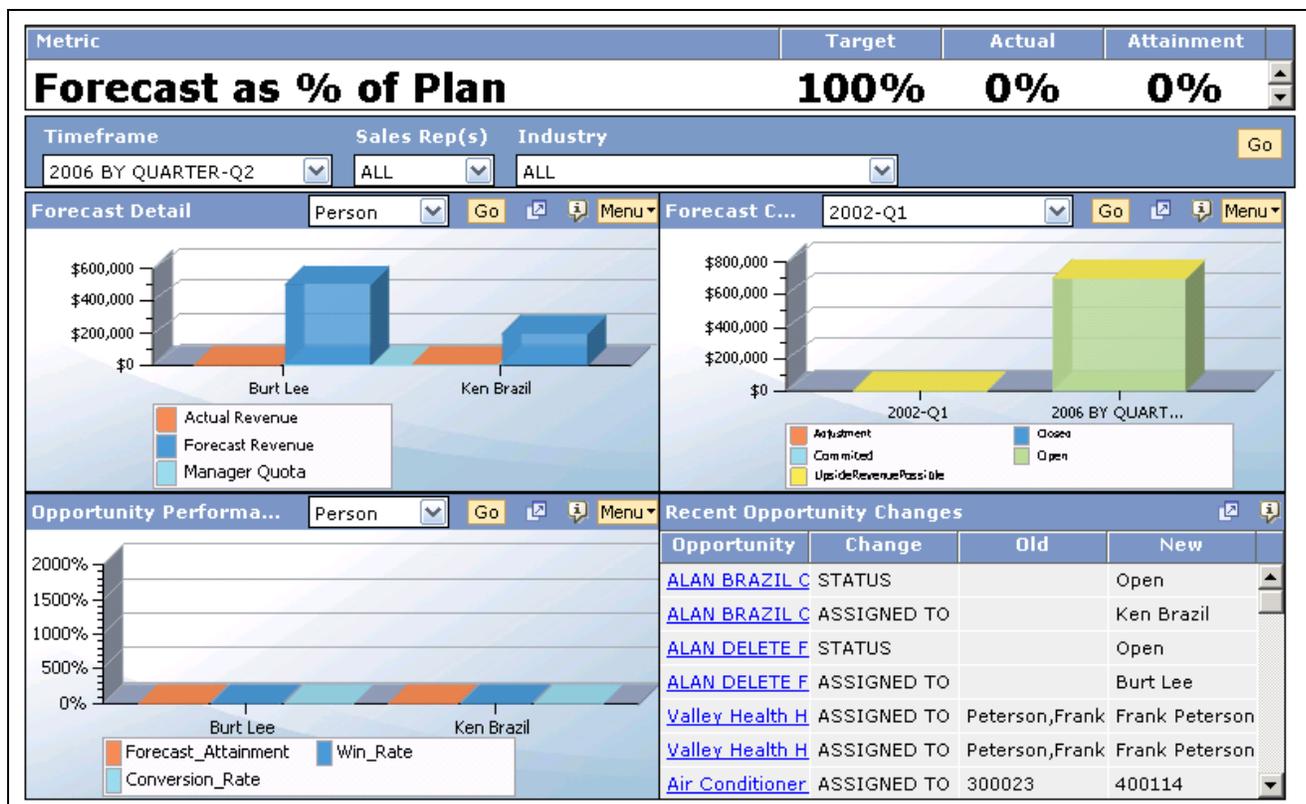
- View the Forecast as Percentage of Plan discovery report page.
- View the Forecast Attainment discovery report page.
- View the Win Rate discovery report page.

Pages Used to View Forecast Management Discovery Reports

Page Name	Object Name	Navigation	Usage
Forecast as Percentage of Plan	Discovery - Forecast as Percentage of Plan	Click the Forecast as Percentage of Plan link in the Forecast Management section of the Sales Summary page.	Compare actual and forecast revenue data to quota information. You can view revenue by forecast type across quarters as well as forecast attainment of deals, win rate, and conversion rates. The system also displays a list of the 50 most recent changes to opportunities.
Forecast Attainment	Discovery - Forecast Attainment	Click the Actual Attainment of Forecast link in the Forecast Management section of the Sales Summary page.	Compare actual and forecast revenue data to quota information. You can view revenue by forecast type across quarters as well as forecast attainment of deals, win rate, and conversion rates. The system also displays a list of the 50 most recent changes to opportunities.
Win Rate	Discovery - Win Rate	Click the Win Ratio link in the Forecast Management section on the Sales Summary page.	View won versus lost revenue by sales representative, name, region, industry, customer, or product. You can also compare win rates to conversion rates, view all open opportunities for the selected timeframes and sales representatives, and then view revenue by loss type.

Using the Forecast as Percentage of Plan Discovery Report Page

Access the Forecast as Percentage of Plan discovery report page.



Forecast as % of Plan discovery report page

Forecast Detail

This view compares actual and forecast revenue to quota. The Y axis measures revenue in millions. The X axis groups the view by sales representative name, region, industry, customer, or partner. You can also filter data to display revenue for closed opportunities.

Forecast Compare

This view displays revenue by forecast type across quarters. The Y axis measures revenue in millions. The X axis groups the report by the selected quarters.

Opportunity Performance

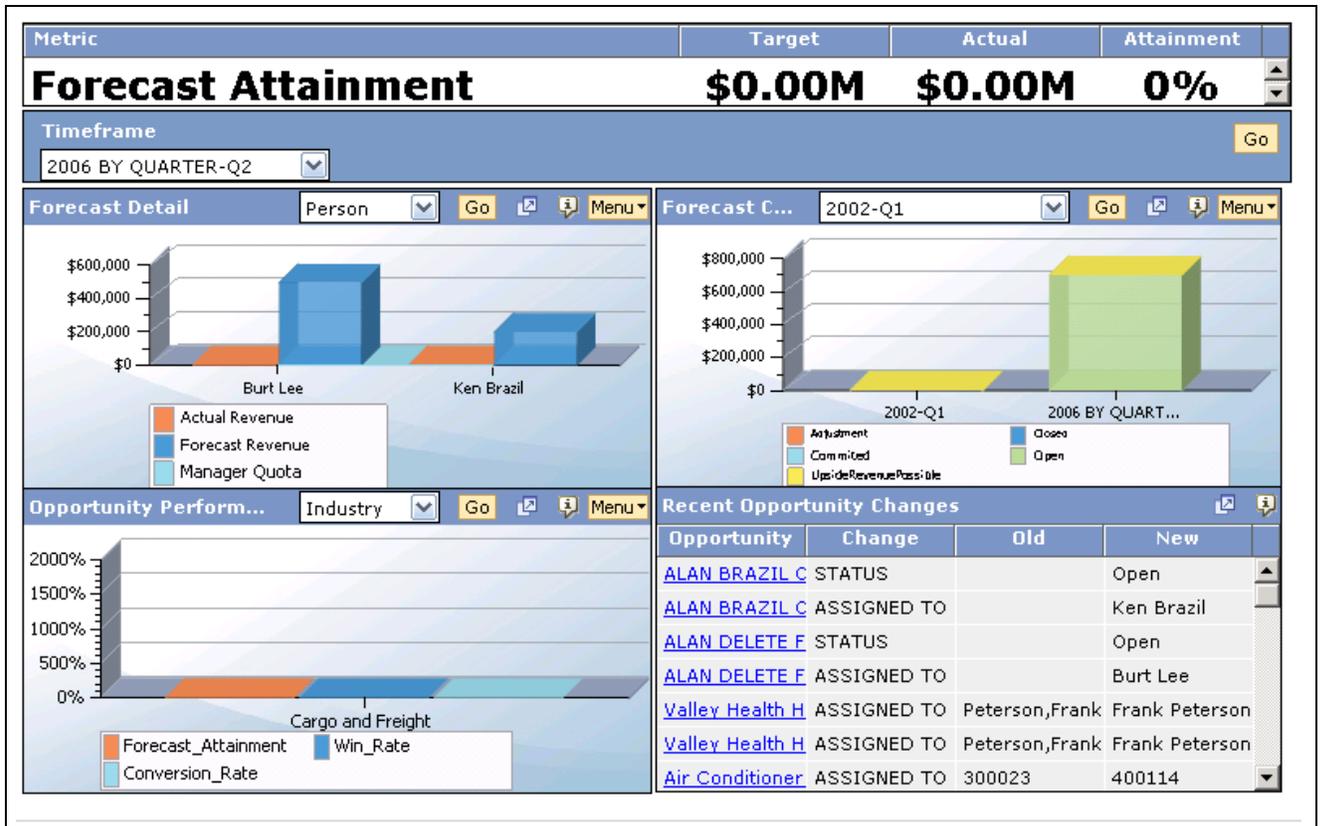
This view displays forecast attainment, win rate, and conversion rate. The Y axis measures percent attained for each. The X axis groups the view by sales representative name, region, industry, customer, or product.

Recent Opportunity Changes

This view displays a list of the 50 most recent changes to opportunities. The list is sorted by change date, with the most recent change at the top. Click an opportunity name to view its details.

Using the Forecast Attainment Discovery Report Page

Access the Forecast Attainment discovery report page.



Forecast Attainment discovery report page

Forecast Detail

This view compares actual and forecast revenue to quota. The Y axis measures revenue in millions. The X axis groups the view by sales representative name, region, industry, customer, or partner. You can also filter data to display revenue for closed opportunities.

Forecast Compare

This view displays revenue by forecast type across quarters. The Y axis measures revenue in millions. The X axis groups the report by the selected quarters.

Opportunity Performance

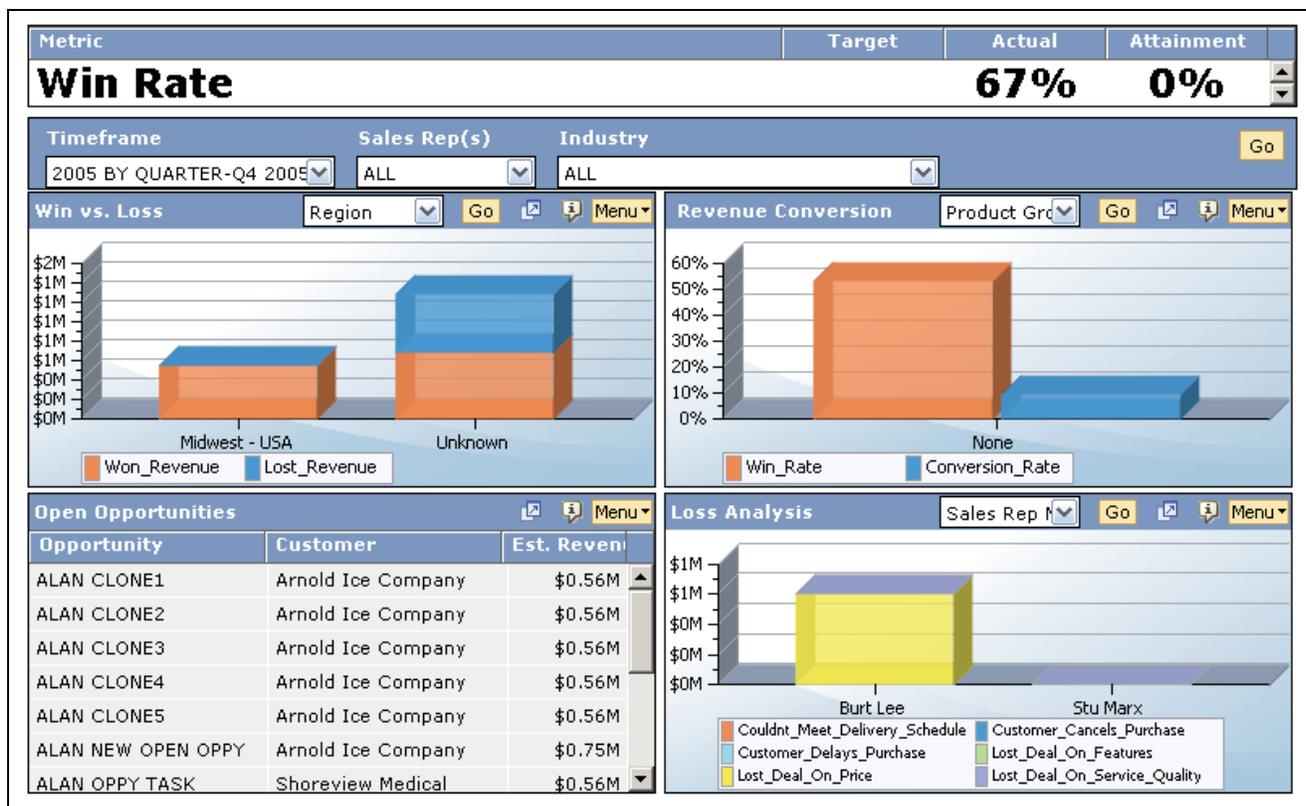
This view displays forecast attainment, win rate, and conversion rate. The Y axis measures percent attained for each. The X axis groups the view by sales representative name, region, industry, customer, or product.

Recent Opportunity Changes

This view displays a list of the 50 most recent changes to opportunities. The list is sorted by change date, with the most recent change at the top. Click an opportunity name to view its details.

Using the Win Rate Discovery Report Page

Access the Win Rate discovery report page.



Win Rate discovery report page

Win vs. Loss

This view displays won versus lost revenue. The Y axis measures revenue in millions. The X axis groups the view by sales representative, name, region, industry, customer, or product. You can also filter data to display revenue for closed opportunities.

Revenue Conversion

This view compares win rates to conversion rates. The Y axis measures the rate in percentages. The X axis groups the view by sales representative, name, region, industry, customer, product, or product group.

Open Opportunities

This view lists all open opportunities for the selected timeframes and sales representatives.

Loss Analysis

This view shows revenue by loss type. The Y axis measures revenue in millions. The X axis groups the view by sales representative, name, region, industry, customer, or partner. You can also filter data to display revenue for closed opportunities.

Using Pipeline Quality and Health Discovery Dashboard Pages

This section discusses how to:

- View the Estimated Revenue discovery report page.

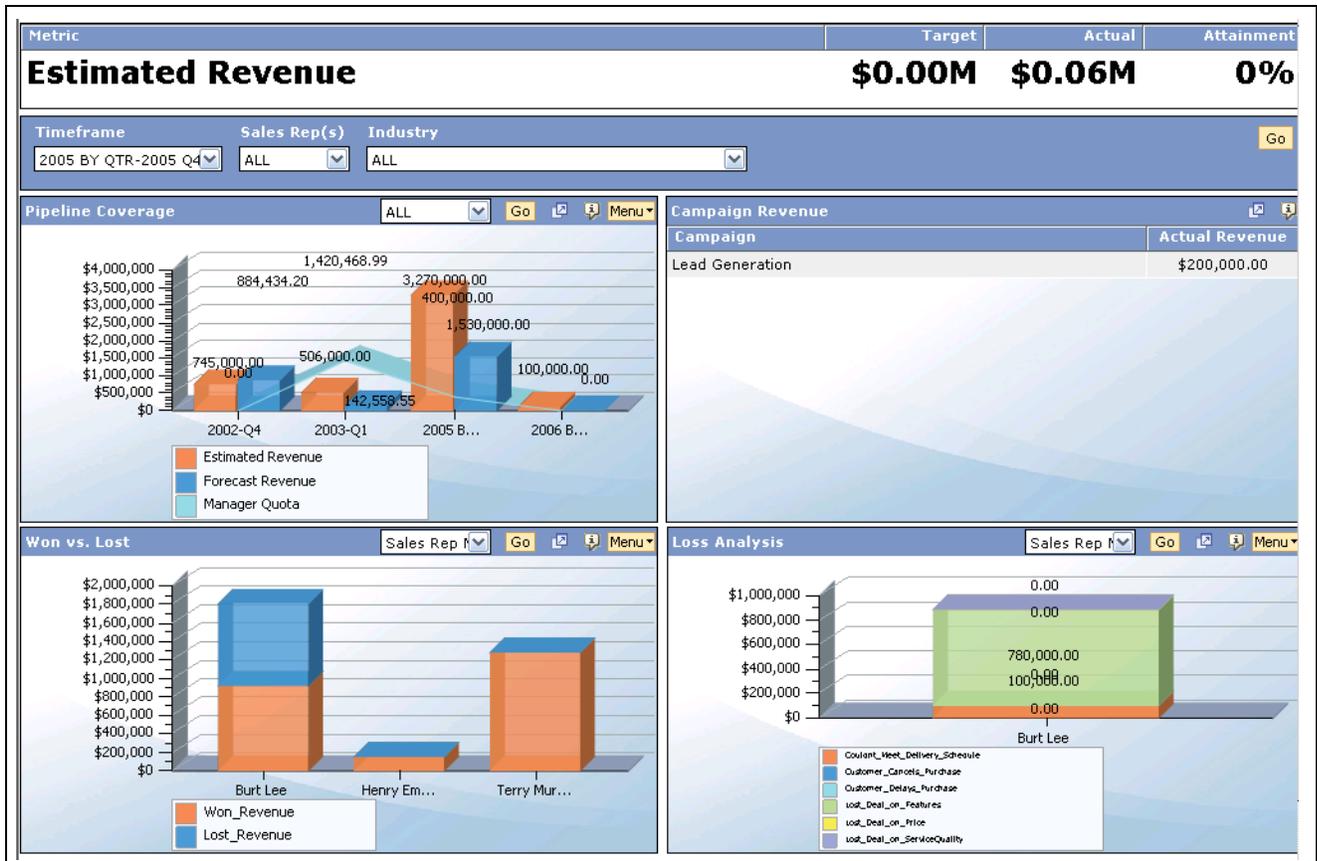
- View the Pipeline Health discovery report page.

Pages Used to View Pipeline Quality and Health Discovery Reports

Page Name	Object Name	Navigation	Usage
Estimated Revenue	Discovery - Estimated Revenue	Click the Estimated Revenue link in the Pipeline Quality and Health section on the Sales Summary page.	Compares pipeline estimated revenue, forecast revenue, and quota by quarter. You can also look at revenue won for each campaign for the selected timeframe, and compare won revenue to lost revenue by sales representative, region, industry, customer, or partner. This discovery report page also enables you to compare pipeline estimated revenue, forecast revenue, and quota by quarter and also display revenue for open opportunities.
Pipeline Health	Discovery - Pipeline Health	Click the Pipeline Health Percentage link in the Pipeline Quality and Health section on the Sales Summary page.	Compare pipeline estimated revenue to quarterly quota by sales representative, name, region, industry, customer, or partner. You can also view pipeline estimated revenue in the form of a funnel chart, display deal health metrics as percentages, and compare new lead counts to the number of leads converted for each quarter.

Using the Estimated Revenue Discovery Report Page

Access the Estimated Revenue discovery report page.



Estimated Revenue dashboard page

Pipeline Coverage

This view compares pipeline estimated revenue, forecast revenue, and quota by quarter. The Y axis measures revenue in millions. The X axis groups the report by quarter for the selected annual timeframe. You can also filter data to display revenue for open opportunities.

Campaign Revenue

This view displays revenue won per campaign for the selected timeframe.

Won vs. Lost

This view compares won revenue to lost revenue. The Y axis measures revenue in millions. The X axis groups the report by sales representative, region, industry, customer, or partner. You can also filter data to display only closed opportunities for the selected timeframe.

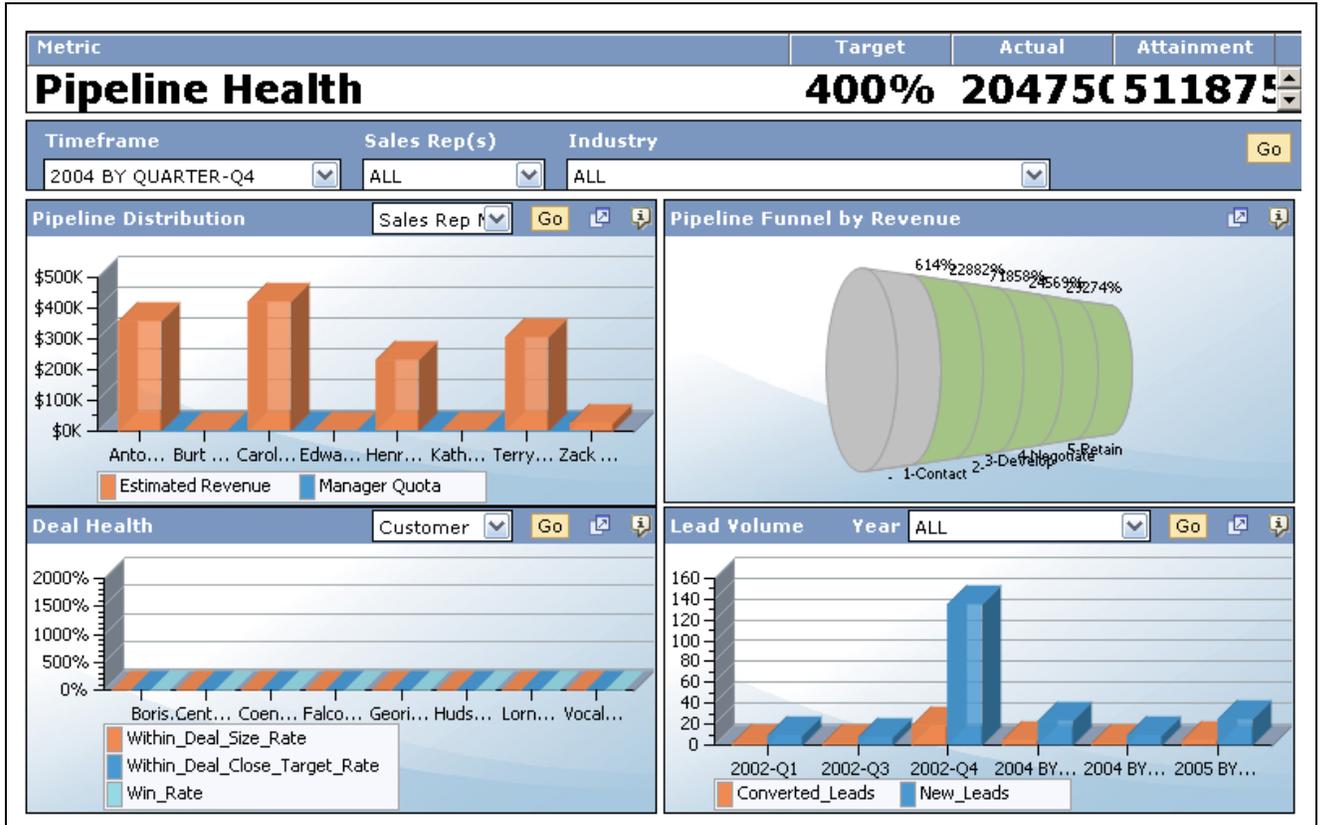
Note. To view partner data you also need to purchase PeopleSoft Partnership Relationship Management (PRM).

Loss Analysis

This view compares pipeline estimated revenue, forecast revenue, and quota by quarter. The Y axis measures revenue in millions. The X axis groups the view by quarter for the selected annual timeframe. You can also filter data to display revenue for all open opportunities.

Using the Pipeline Health Discovery Report Page

Access the Pipeline Health discovery report page.



Pipeline Health discovery report page

Pipeline Distribution

This view compares pipeline estimated revenue to quota by quarter. The Y axis measures revenue in thousands. The X axis groups the view by sales representative, name, region, industry, customer, or partner. You can also filter data to display revenue for all open opportunities.

Pipeline Funnel by Revenue

This view displays the pipeline estimated revenue in the form of a funnel chart. The view filters data to display revenue for open opportunities. To display pipeline opportunity counts, select *Pipeline Health - Funnel by Count* from the Menu drop-down list.

Deal Health

This view displays deal health metrics as percentages. The Y axis measures percentage. The X axis groups the report by sales representative, name, region, industry, customer, or partner.

Lead Volume

This view compares the new lead count to the number of leads converted by quarter. The Y axis measures the number of leads. The X axis groups the report by quarter for the annual timeframe selected.

Note. You can only drill into new leads, not the converted leads, within the Lead Volume view.

Using the Account Management Discovery Dashboard Pages

This section discusses how to:

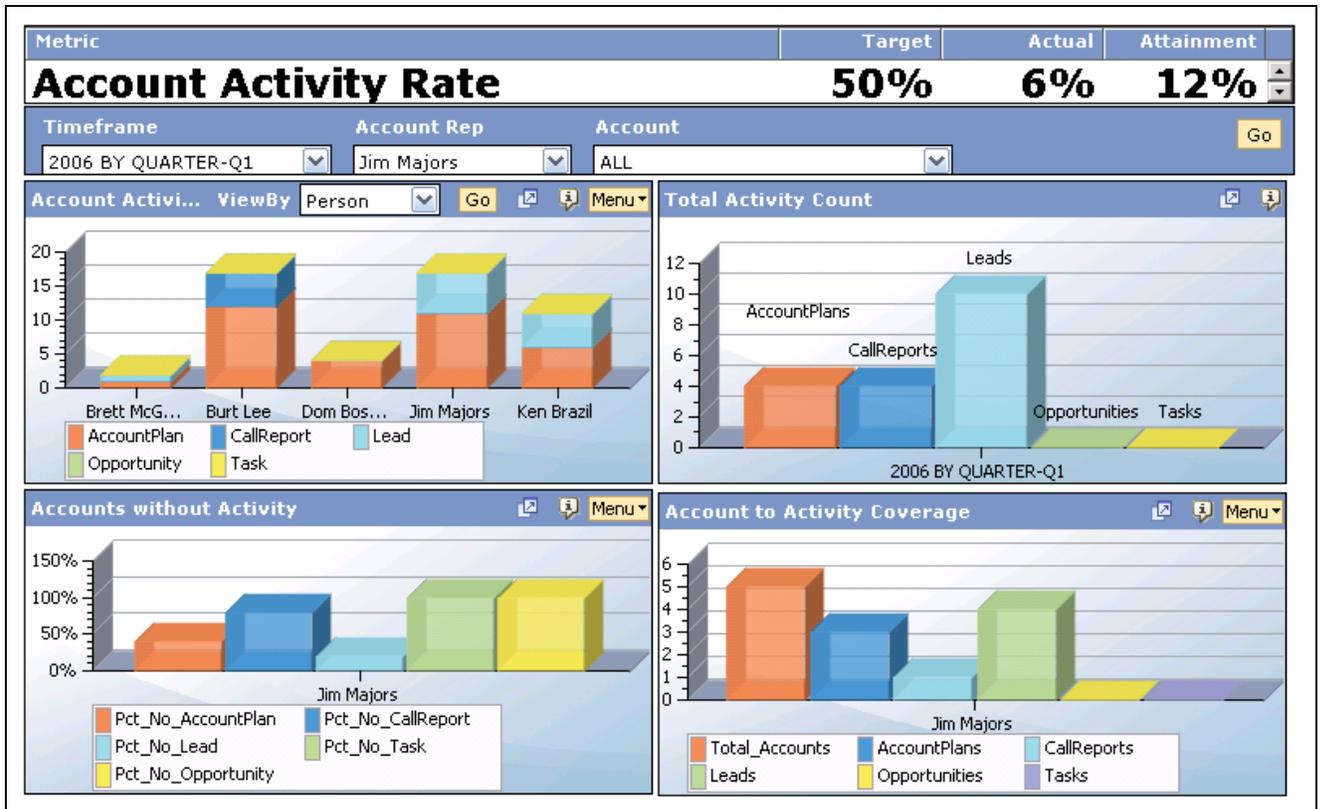
- View the Account Activity Rate discovery report page.
- View the Average Revenue per Account discovery report page.
- View the Attainment of Plan Goals discovery report page.

Pages Used to View Account Management Discovery Reports

Page Name	Object Name	Navigation	Usage
Account Activity Rate	Discovery - Account Activity	Click the Account Activity Rate link in the Account Management section on the Sales Summary page.	This discovery report measures the number of activity types per sales representative, the total number of activity types completed during a selected timeframe, the percentage of accounts missing a given activity type, and the amount of account to activity coverage.
Average Revenue per Account	Discovery - Average Revenue	Click the Average Revenue per Account link in the Account Management section on the Sales Summary page.	This discovery report measures the average of closed-won revenue based on opportunity data, the sum of actual revenue, won and lost revenue, and actual revenue that is summarized by account, where the opportunity status is equal to <i>Closed-Won</i> .
Attainment of Plan Goals	Discovery - Overall Attainment of Goals	Click the Attainment of Plan Goals link in the Account Management section on the Sales Summary page.	This report measures goal attainment percentage, which is grouped into five different categories. It also measures the average goal attainment percentage across all accounts and groups accounts into categories according to the number of activity types associated with it. The last view measures the goal attainment percentage data by account or account representative.

Using the Account Activity Rate Discovery Report Page

Access the Account Activity Rate discovery report page.



Account Activity Rate discovery report page

Account Activity by Rep

This view measures the number of activity types per sales representative. The Y axis measures the number of activity types. The X axis groups the report by sales representative. You can also filter data to display all associated activity types to an individual sales representative either by timeframe or account.

Total Activity Count

This view measures the total number of activity types that have been completed during a selected timeframe. The Y axis measures the total number of activity types. The X axis groups the report by activity type. You can also filter data to display all activity types during a selected timeframe.

Accounts Without Activity

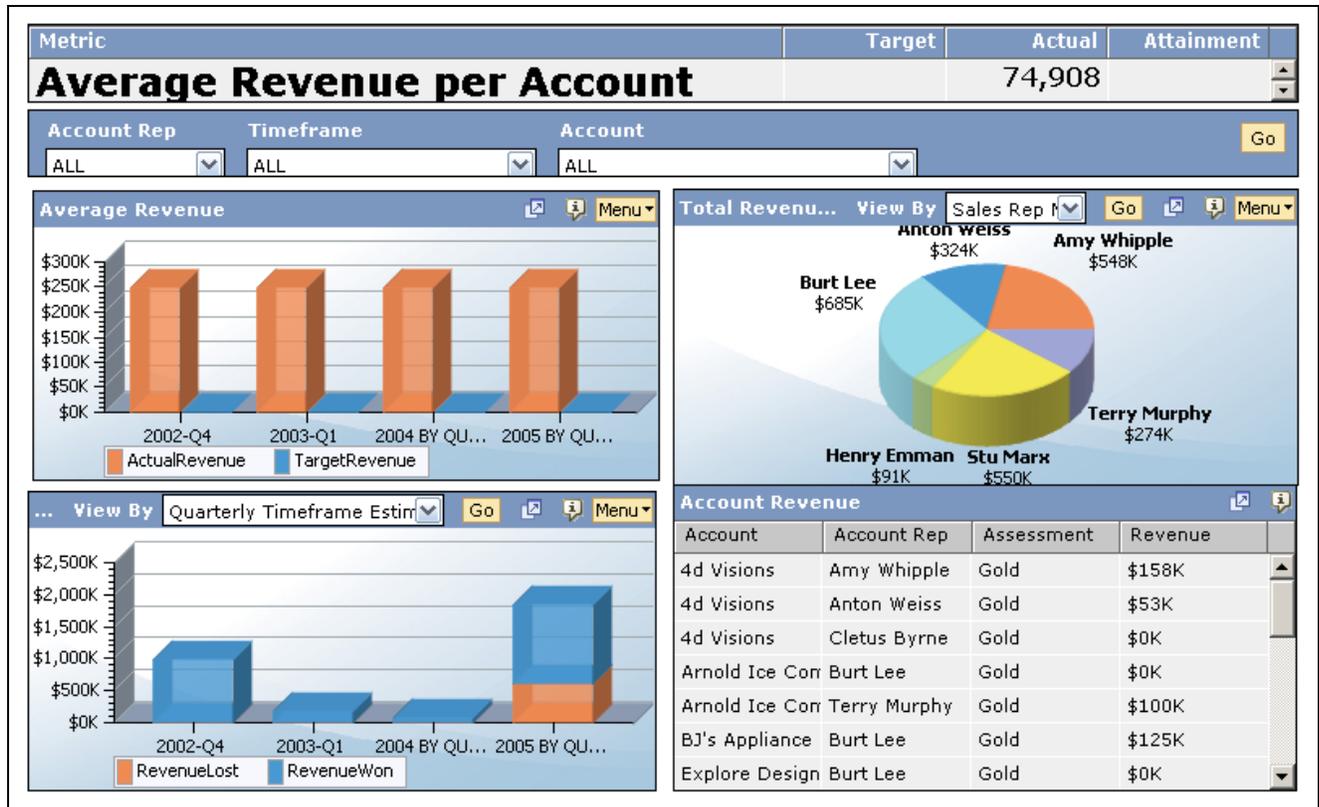
This view measures the percentage of accounts missing a given activity type. The Y axis is the percentage count of accounts. The X axis groups the report by sales representative. You can also filter data by sales representative and timeframe.

Account to Activity Coverage

This view measures the amount of account to activity coverage. The Y axis measures the amount of coverage. The X axis groups the view by sales representative. Total accounts represent the overall number of account touches. This metric is further broken down by specific activity touch types. You can also filter data to display account to activity coverage by sales representative, account, or timeframe.

Using the Average Revenue per Account Discovery Report Page

Access the Average Revenue per Account discovery report page.



Average Revenue per Account discovery report page

Average Revenue

This view measures the average of closed-won revenue based on opportunity data. The Y axis measures the average amount of revenue. The X axis groups the report by timeframe. The bars represent the average of target and actual revenue. The view filters data by account or timeframe.

Total Revenue Analysis

This view measures the sum of actual revenue. The view filters data by timeframe, account representative, and account. It may be viewed by account representative, account, or assessment.

Revenue Won/Lost

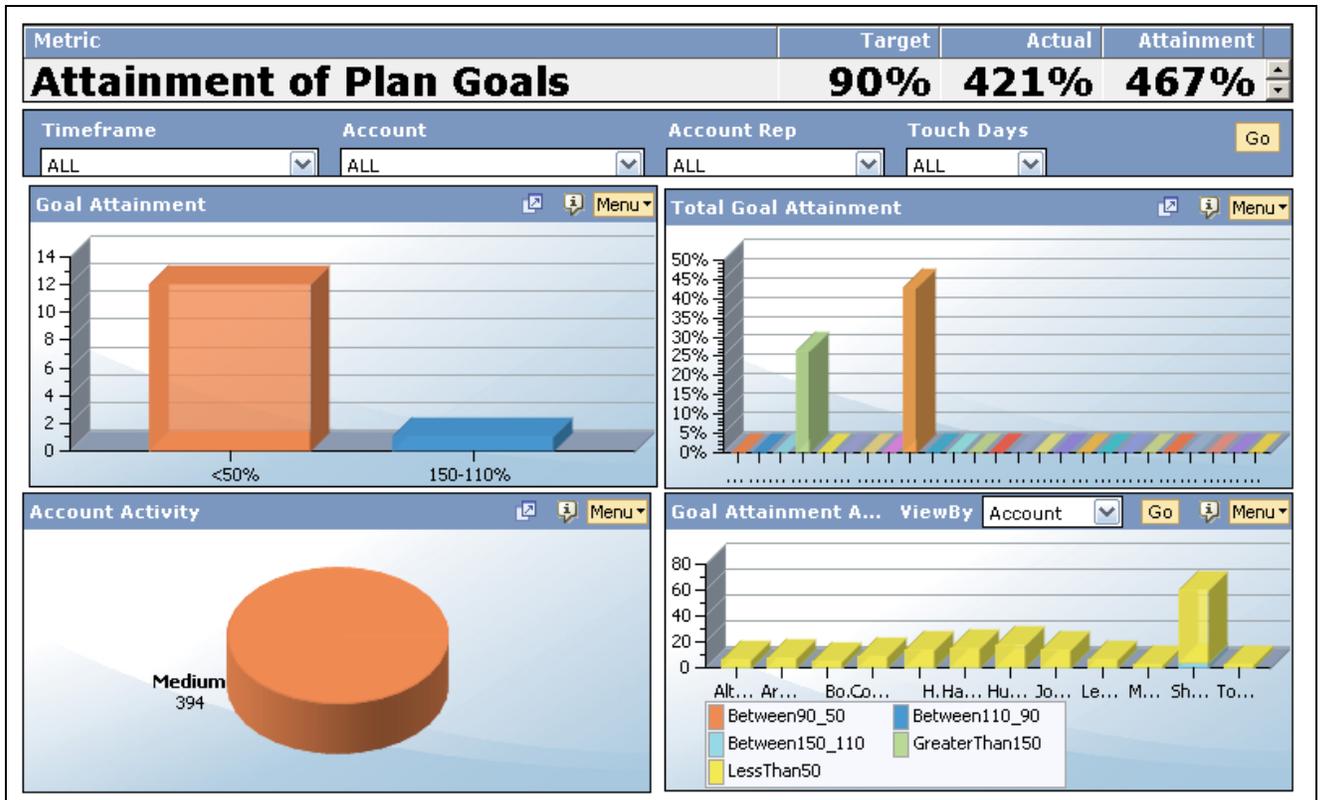
This view measures both won and lost revenue. The Y axis measures the total amount of both won and lost revenue. The X axis groups the report by account. The view filters data to display won and lost revenue by timeframe or by account. You can also filter data by customer or timeframe.

Account Revenue

This view displays actual revenue that is summarized by account, where the opportunity status is equal to *Closed-Won*. The view filters data to display actual revenue by account representative and account.

Using the Attainment of Plan Goals Discovery Report Page

Access the Attainment of Plan Goals discovery report page.



Attainment of Plan Goals discovery report page

Goal Attainment

This view measures goal attainment percentage that is grouped into four different categories. The Y axis measures the attainment percentage achieved. The X axis groups the view by the corresponding categories. You can also filter data to display percentage attainment by timeframe. The X axis groups the goal attainment percentages into these ranges:

- <50 percent
- 50-90 percent
- 90-110 percent
- >110 percent

Total Goal Attainment

This view measures the average goal attainment percentage across all accounts. The Y axis measures the average goal attainment percentage. The X axis groups the view by goal name. You can also filter data by account, account representative, and timeframe.

Account Activity

This view displays the number of accounts with *High Touch*, *Medium Touch*, *Low Touch* and *No Touch*. There are five touch types:

- Lead
- Opportunity
- Call Report

- Task
- Account Plan

To be considered *High Touch*, an account should have one of each of the touch types during the past number of touch days. *Medium Touch* accounts should have three or four touch types. *Low Touch* accounts should have one or two touch types. *No Touch* accounts have no touch types. Touch days is a number between 1 and 31. You can specify the number of touch days by choosing the value in the global filter.

Goal Attainment Analysis

This view is a further breakdown of the Goal Attainment view. It measures the goal attainment percentage. The view filters data by account or account representative. You can also filter data by goal name, account representative, or account. The X axis uses a bar chart which stacks the goal attainment percentages into these ranges:

- <50 percent
- 50-90 percent
- 90-110 percent
- >110 percent

Using the Sales Team Performance Discovery Dashboard Pages

This section discusses how to:

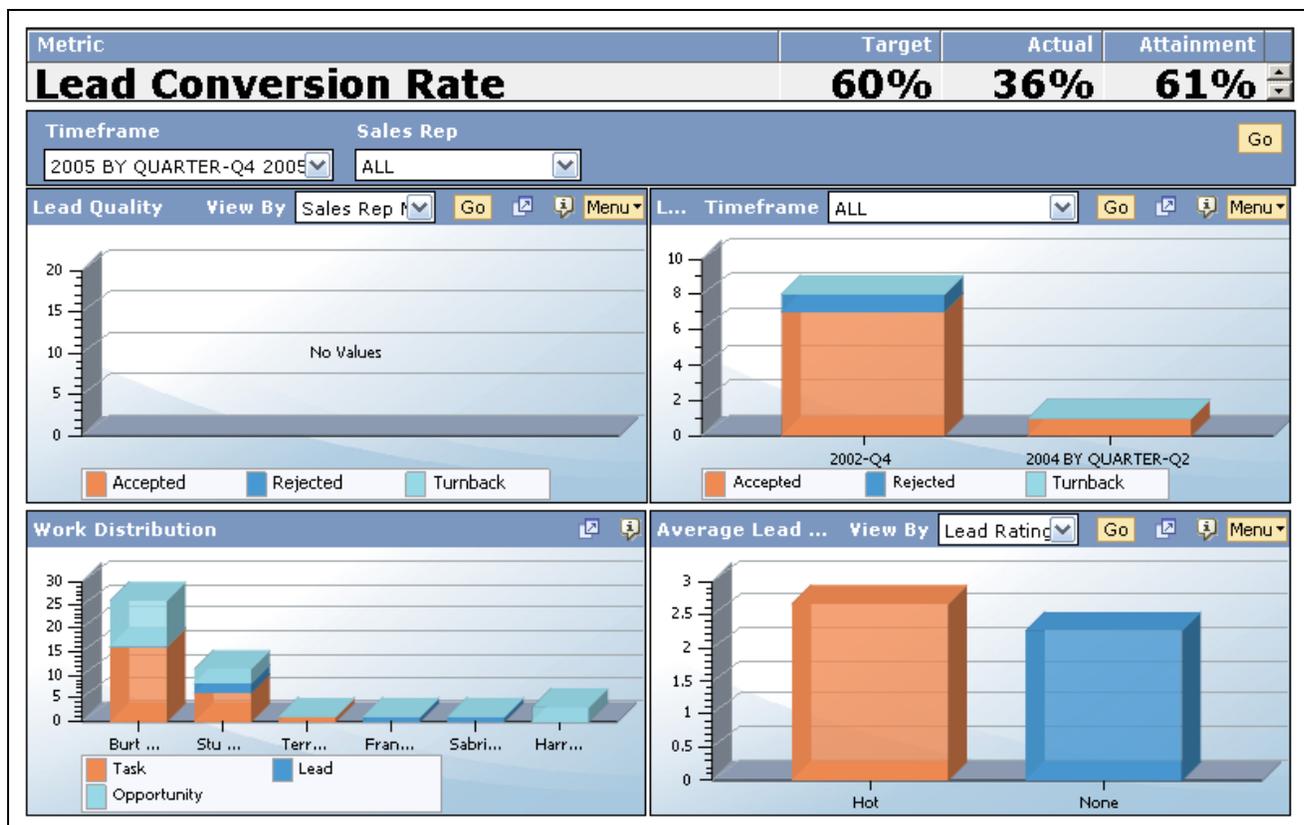
- Use the Lead Conversion Rate discovery report page.
- Use the Watch List Opportunity Activity Rate discovery report page.
- Use the Quota Attainment Percentage discovery report page

Pages Used to View the Sales Team Performance Discovery Reports

Page Name	Object Name	Navigation	Usage
Lead Conversion Rate	Discovery - Lead Conversion Rate	Click the Lead Conversion Rate link in the Sales Team Performance section on the Sales Summary page.	This discovery report measures the number of leads by lead status. The report can be grouped by sales representative, industry, partner, region or campaign. It also tracks the number of leads for each status and filters data to display information by sales representative. Using this report, you can also view a measurement of open items that are assigned to sales representatives and the average time it takes to respond to a lead.
Watch List Opportunity Activity Rate	Discovery - Opportunity Activity Rate	Click the Active Opportunities link in the Sales Team Performance section on the Sales Summary page.	This discovery report displays items on the priority watch list which meet certain conditions. You can also view the number of opportunities, which are displayed as closed-won and closed-lost. This report displays the top 10 opportunities by revenue that are not on the watch list. It filters data to display only closed opportunities where the sales priority equals 1 for the selected sales representatives.
Quota Attainment Percentage	Discovery - Quota Attainment Percentage	Click the Quota Attainment Percentage link in the Sales Team Performance section on the Sales Summary page.	This discovery report measures opportunity revenue by opportunity status and summarizes actual revenue for opportunities with a status of <i>Closed-Won</i> . You can also view the lead conversion rate, the account touch rate, and the percent of quota attainment. The last view in the report measures the average time to respond to a lead.

Using the Lead Conversion Rate Discovery Report Page

Access the Lead Conversion Rate discovery report page.



Lead Conversion Rate discovery report page

Note. This report displays information by manager and the sales representatives that report to the manager.

Lead Quality

This view measures the number of leads by lead status. The Y axis tracks the number of leads for each status. The X axis groups the report by sales representative as a default. You can change the view to group the data by industry, partner, region or campaign. The view also filters data for the selected timeframe and selected sales representatives. Only leads with the status of *accepted*, *rejected* or *turned back* are shown.

Lead Quality Compare

This view measures the number of leads by lead status. The Y axis tracks the number of leads for each status. The X axis groups the view by selected comparison timeframes. The report filters data to display information by sales representative. Only leads with the status of *Accepted*, *Rejected* or *Turned Back* are shown.

Work Distribution

This view measures open items assigned to sales representatives. The Y axis charts the number of open items (tasks, leads, and opportunities). The X axis groups the view by sales representative. You can also filter data to display for the selected timeframe and for selected sales representatives. Only tasks with an open or in-process status are shown. Also, only leads with the status of *New*, *Open*, *Accepted*, or *Working* are shown. Only opportunities with a status of *Open* are shown.

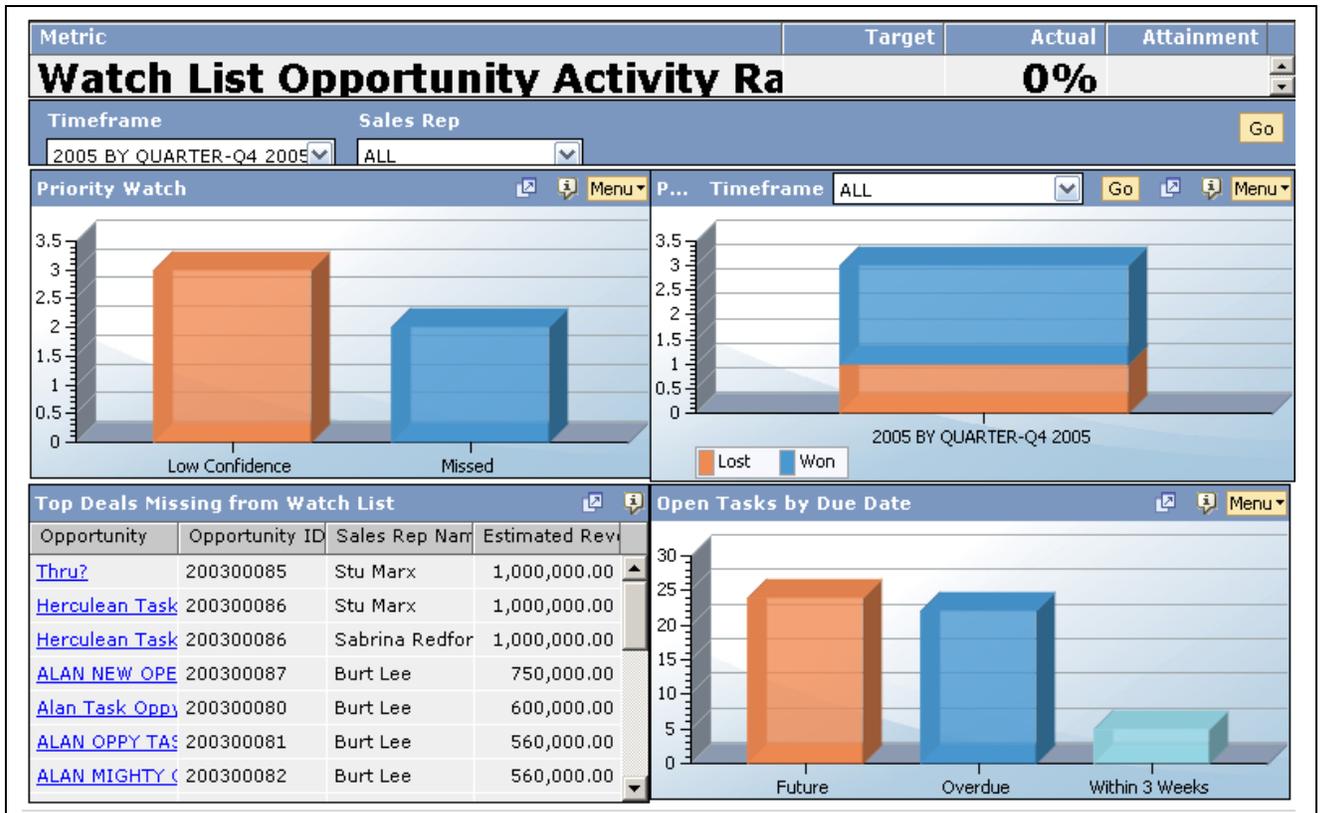
Average Lead Response Days

This view measures the average time to respond to a lead. Response days are defined as the time between lead creation and one of three dates: lead acceptance, lead rejection or conversion date (which represents conversion to opportunity).

If none of the three dates exist, the response date is assumed to be the current date. The Y axis charts the number of days to respond. The X axis groups the report by lead rating as a default, and can be changed to group by region, sales representative, or campaign. The report filters data to display information for the selected timeframe and selected sales representatives.

Using the Watch List Opportunity Activity Rate Discovery Report Page

Access the Watch List Opportunity Activity Rate discovery report page.



Watch List Opportunity Activity Rate discovery report page

Priority Watch

This view displays items on the priority watch list (sales priority = 1) that meet certain conditions. The Y axis measures the number of opportunities. The X axis groups the report by various conditions:

- Low confidence (confidence percentage < 50).
- Missed (estimated close date < current date).
- Not forecast (opportunity forecast total amount = 0).

The report filters data to display only open opportunities where the sales priority equals 1 for the selected timeframe and sales representatives.

Priority Watch Historical

This view displays items on the priority watch list (sales priority = 1). The Y axis displays the number of opportunities, which are displayed as closed-won and closed-lost. The X axis groups the data into the selected comparison timeframes. The view filters data to display only closed opportunities where the sales priority equals 1 for the selected sales representatives.

Top Deals Missing from Watch List

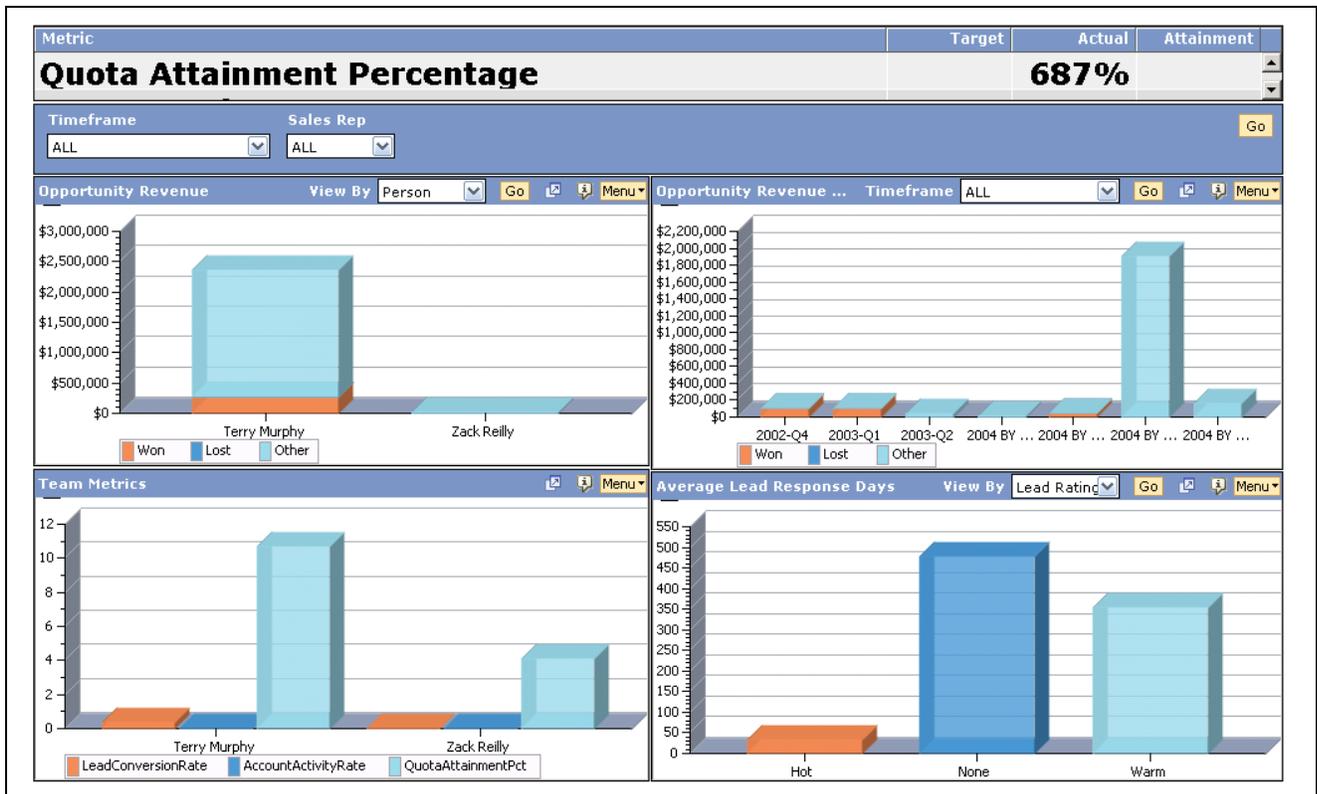
This view displays the top 10 opportunities by revenue that are not on the watch list. Watch list items have a sales priority equal to 1. The view filters data to display only opportunities where the sales priority is not equal to 1 for the selected timeframe and sales representatives.

Open Tasks by Due Date

This view displays items on the priority watch list (sales priority = 1). The Y axis displays the number of opportunities, which are displayed as closed-won and closed-lost. The X axis groups the data into the selected comparison timeframes. The report filters data to display only closed opportunities where the sales priority equals 1 for the selected sales representatives.

Using the Quota Attainment Percentage Discover Report Page

Access the Quota Attainment Percentage discovery report page.



Quota Attainment Percentage discovery report page

Note. This report is aggregated at the Manager level and does not display information for the sales representatives that report to the manager.

Opportunity Revenue

This view measures opportunity revenue by opportunity status. The Y axis sums actual revenue for opportunities with a status of *Closed-Won* and estimated revenue for all other opportunities. The X axis groups the view by sales representative as the default. The view can be filtered to group the information by industry, product group, or region. You can also filter data to display selected quarterly timeframes and selected sales representatives.

Opportunity Revenue Compare

This view measures opportunity revenue by opportunity status. The Y axis summarizes actual revenue for opportunities with a status of *Closed-Won* and estimated revenue for all other opportunities. The X axis groups the view by selected comparison timeframes. You can also filter data to display selected sales representatives.

Team Metrics

This view displays the lead conversion rate, the account touch rate, and the percent of quota attainment. The Y axis charts the three ratio values. The X axis groups the report by sales representative. You can also filter data to display information for the selected timeframe and selected sales representatives.

Average Lead Response Days

This view measures the average time to respond to a lead. Response days are defined as the time between lead creation and one of three dates:

- Lead acceptance.
- Lead rejection.
- Conversion date (which represents conversion to opportunity).

If none of the three dates exist, the response date is assumed to be the current date. The Y axis charts the number of days to respond. The X axis groups the report by lead rating as a default. You can also change the view to group data by region, sales representative or campaign. Additional filters enable you to sort data to display information for the selected timeframe and selected sales representatives.

Executing Actions from the Sales Dashboard Discovery Pages

This section discusses how to:

- Add account tasks.
- Add representatives to accounts.
- Notify representatives to engage with accounts.
- Replace representatives on accounts.
- Add an opportunity task.
- Add representatives to a lead.
- Add representatives to an opportunity.
- Add a sales user task.
- Send email to high performer sales representatives.
- Notify representatives to engage with an account.

- Drill to an opportunity in Pure Internet Architecture.
- Reassign a lead.
- Reassign an opportunity.
- Update a lead priority.
- Update an opportunity priority.

Pages Used to Execute Actions from the Sales Dashboards

Page Name	Object Name	Navigation	Usage
Add Account Task	Action - Add Account Task	Select the Action - Add Account Task link from the Menu drop-down list on a discovery report page.	Add tasks to accounts
Add Reps to Accounts	Action - Add Reps To Accounts	Select the Action - Add Reps to Accounts link from the Menu drop-down list on a discovery report page.	Add sales representatives to accounts
Notify Reps to Engage With Account	Action - Notify Reps to Engage With Account	Select the Action - Notify Reps to Engage With Account link from the Menu drop-down list on a discovery report page.	Notify sales representatives that they should engage with selected accounts.
Replace Rep on Accounts	Action - Replace Rep on Accounts	Select the Action - Replace Rep on Accounts link from the Menu drop-down list on a discovery report page.	Replace sales representatives on selected accounts
Add Opportunity Task	Action - Add Opportunity Task	Select the Action - Add Opportunity Task link from the Menu drop-down list on a discovery report page.	Add tasks to selected opportunities
Add Reps to Lead	Action - Add Reps to Lead	Select the Action - Add Reps to Lead link from the Menu drop-down list on a discovery report page.	Add sales representatives to selected leads
Add Reps to Opportunity	Action - Add Reps to Opportunity	Select the Action - Add Reps to Opportunity link from the Menu drop-down list on a discovery report page.	Add sales representatives to selected opportunities.
Add Sales User Task	Action - Add Sales Rep Task	Select the Action - Add Sales User Task link from the Menu drop-down list on a discovery report page.	Add task details to selected sales users.
Email High Performer Sales Rep	Action - Email High Performer Sales Rep	Select the Action - Email High Performer Sales Rep from the Menu drop-down list on a discovery report page.	Send emails to sales representatives who are performing at a high levels.

Page Name	Object Name	Navigation	Usage
Email Opportunity Primary Rep	Action - Email Opportunity Primary Rep	Select the Action - Email Opportunity Primary Rep link from the Menu drop-down list on a discovery report page.	Email opportunities to primary sales representatives.
Opportunity Drill to PIA	Action - Opportunity Drill to PIA	Select the Action - Opportunity Drill to PIA link from the Menu drop-down list on a discovery report page.	Access the opportunity pages in PeopleSoft CRM Sales.
Reassign Leads	Action - Reassign Leads	Select the Action - Reassign Lead link from the Menu drop-down list on a discovery report page.	Reassign selected leads to a new primary sales representative.
Reassign Opportunity	Action - Reassign Opportunity	Select the Action - Reassign Opportunity link from the Menu drop-down list on a discovery report page.	Reassign selected opportunities to a new primary sales representative.
Update Lead Priority	Action - Update Lead Priority	Select the Action - Update Lead Priority link from the Menu drop-down list on a discovery report page.	Update the priority on selected leads.
Update Opportunity Priority	Action - Update Opportunity Priority	Select the Action - Update Opportunity Priority link from the Menu drop-down list on the discovery report page.	Update the priority on selected opportunities.

Adding Account Tasks

Access the Add Account Task action page.

Add Account Task

Step 1: Select Accounts
Account Manager:

	Account Name	Account Manager	Account BO ID	Role Type ID	
<input type="checkbox"/>	MMA Property Management Gr	Stephen Ray	101	2	▲
<input checked="" type="checkbox"/>	MMA Property Management Gr	Stu Marx	101	2	▲
<input type="checkbox"/>	MMA Property Management Gr	Sabrina Redford	101	2	▼

Step 2: Add Task Details

Task Details

Task Owner:

Task Type: **Priority:**

Start Date: **End Date:**

Step 3: Review Status

Account Name	Task Subject	Action Status	Action Error Message
MMA Property Management Grou			

Add Account Task action page

To add tasks to an account:

1. Select the accounts to which you want to add task details.
2. Select the task details from the fields in the Add Task Details section.
3. Click Create Task.
4. Review the results in the Review Status section.

Adding Representatives to Accounts

Access the Add Reps To Accounts action page.

Add Reps To Accounts

Step 1: Select Accounts			Account Manager	ALL	Filter
	Account Name	Account Manager	Role Type ID		
<input type="checkbox"/>	MMA Property Management Group	Stephen Ray	2		
<input type="checkbox"/>	MMA Property Management Group	Stu Marx	2		
<input checked="" type="checkbox"/>	MMA Property Management Group	Sabrina Redford	2		
<input type="checkbox"/>	MMA Property Management Group	Tyson Bruno	2		
<input type="checkbox"/>	MMA Property Management Group	Stuart Edwards	2		

Step 2: Select Reps	
Sales User	Person ID
<input type="checkbox"/>	Stu Marx
<input checked="" type="checkbox"/>	Alex Ash
<input checked="" type="checkbox"/>	Ian Steward
<input type="checkbox"/>	Stuart Edwards
<input type="checkbox"/>	Luke Quincey

Step 3: Review Status					
Account Name	Account Manager	Role Type ID	Action Status	Action Request DateT	Action Error Message
MMA Property Manage	Ian Steward	2	Processing	7/20/2005 10:06:45:5	
MMA Property Manage	Alex Ash	2	Processing	7/20/2005 10:06:45:4	

Add Reps To Accounts action page

To add sales representative to accounts:

1. Select the accounts to which you want to add sales representatives.
2. Select the sales representatives that you want to add to the accounts.
3. Click Add Reps.
4. Review the results in the Review Status section.

Notifying Representatives to Engage with Accounts

Access the Notify Reps to Engage With Account action page.

Notify Reps to Engage With Account

Step 1: Select Account by Clicking on the Row

Account Name	Account Manager
Arnold Ice Company	Burt Lee
Arnold Ice Company	Terry Murphy
Boris May & Company	Terry Murphy

Step 2: Compose Email

Email Recipients

To: Burt Lee

CC:

BCC: (Enter other recipient email addresses.)

Template: RSF:Notify Reps to Engage

Subject: Arnold Ice Company

Dear Burt Lee:

Please contact this customer regarding... They have requested a sales call within the next two weeks.

Step 3: Confirmations

Recipient	Action Status	Action Error Message
Burt Lee	Action is completed	

Notify Reps to Engage With Account action page

To notify sales representatives that they should engage with selected accounts:

1. Click the name of the sales representative or account.
2. Compose the email using the fields in the Compose Email section.
3. Click Send.
4. Review the results in the Confirmations section.

Replacing Representatives on Accounts

Access the Replace Rep On Accounts action page.

Replace Rep On Accounts

Step 1: Select Account and Current Rep					Account Manager	ALL	Filter
<input type="checkbox"/>	Account Name	Account Manager	Account BO ID	Role Type ID	Person ID		
<input type="checkbox"/>	MMA Property Managem	Stephen Ray	101	2	764		
<input checked="" type="checkbox"/>	MMA Property Managem	Stu Marx	101	2	0011		
<input type="checkbox"/>	MMA Property Managem	Sabrina Redford	101	2	767		
<input type="checkbox"/>	MMA Property Managem	Tyson Bruno	101	2	593		

Step 2: Select New Rep	
Sales User	Person ID
<input type="radio"/> Stu Marx	0011
<input type="radio"/> Alex Ash	1001
<input checked="" type="radio"/> Ian Steward	1002
<input type="radio"/> Stuart Edwards	1003
<input type="radio"/> Luke Quincey	1004
<input type="button" value="Replace Rep"/>	

Step 3: Review Status					
Account Name	Role Type ID	Current Account Rep	New Account Rep	Action Status	Action Error Message
MMA Property Manag	2	Stu Marx	Ian Steward	Processing	

Replace Rep on Accounts action page

To replace sales representatives on selected accounts:

1. Select the accounts that you want to replace with a new sales representative.
2. Select the new sales representative.
3. Click Replace Rep.
4. Review the results in the Review Status section.

Adding an Opportunity Task

Access the Add Opportunity Task action page.

Add Opportunity Task

Step 1: Select Opportunities

	Opportunity	Customer	Sales Rep Name	Opportunity ID	Business Unit Code
<input type="checkbox"/>	Activity 2	Arnold Ice Company	Harry Singer	200300111	APP01
<input checked="" type="checkbox"/>	Forecast Revenue	Arnold Ice Company	Burt Lee	200300093	APP01
<input type="checkbox"/>	Missed1	MMA Property Managemen	Stu Marx	200300115	US200

Filters ALL ALL Filter

Step 2: Add Task Details

Task Details

Task Owner

Task Type **Priority**

Start Date **End Date**

Step 3: Review Status

Opportunity ID	Task Subject	Action Status	Action Error Message
200300093		Action cannot be executed due to	is a required parameter. The act

Add Opportunity Task action page

To add tasks to selected opportunities:

1. Select the opportunities to which you want to add tasks.
2. Enter the task details using the fields in the Add Task Details section.
3. Click Create Task.
4. Review the results in the Review Status section.

Adding Representatives to a Lead

Access the Add Reps To Lead action page.

Add Reps To Lead

Step 1: Select Leads					
			Filters	ALL	Filter
			Filters	ALL	
<input type="checkbox"/>	Lead	Customer	Sales Rep Name	Lead ID	Business Unit Code
<input type="checkbox"/>	Computers for IMC	IMC, Inc	Frank Peterson	10010070	US300
<input checked="" type="checkbox"/>	Hardware upgrade for M	MD Engineering	Frank Peterson	10010071	US300
<input type="checkbox"/>	Cady Dishwasher Lead	Cady Montgomery	Sam Rabbitt	1000300113	US200
<input type="checkbox"/>	Cady Dishwasher Lead	Cady Montgomery	Sam Rabbitt	1000300027	US200
<input type="checkbox"/>	Jordan Enterprises	Jordan Enterprises	John Garcia	10010063	FSI01

Step 2: Select Reps	
<input type="checkbox"/>	Sales User
<input type="checkbox"/>	Stu Marx
<input checked="" type="checkbox"/>	Alex Ash
<input type="checkbox"/>	Ian Steward
Add Reps	

Step 3: Review Status			
Lead	Sales User	Action Status	Action Error Message
Hardware upgrade for MD Engine	Alex Ash	Processing	

Add Reps To Lead action page

To add sales representatives to selected leads:

1. Select the leads to which you want to add sales representatives.
2. Select the sales representatives.
3. Click Add Reps.
4. Review the results in the Review Status section.

Adding Representatives to an Opportunity

Access the Add Reps To Opportunity action page.

Add Reps To Opportunity

Step 1: Select Opportunities					Filters	ALL	ALL	Filter
<input type="checkbox"/>	Opportunity	Customer	Sales Rep Name	Opportunity ID	Business Unit Code			
<input type="checkbox"/>	Activity 1	Shoreview Medical	Harry Singer	200300110	APP01			
<input type="checkbox"/>	Activity 3	Shoreview Medical	Harry Singer	200300112	APP01			
<input type="checkbox"/>	Activity 2	Arnold Ice Company	Harry Singer	200300111	APP01			
<input checked="" type="checkbox"/>	Forecast Revenue	Arnold Ice Company	Burt Lee	200300093	APP01			
<input type="checkbox"/>	Missed1	MMA Property Managemen	Stu Marx	200300115	US200			

Step 2: Select Reps		
<input type="checkbox"/>	Sales User	Person ID
<input checked="" type="checkbox"/>	Diane Briseno	300038
<input type="checkbox"/>	Steve Elway	200002
<input type="checkbox"/>	Pat Ziller	300098
<input type="button" value="Add Reps"/>		

Step 3: Review Status				
Opportunity	Sales User	Action Status	Action Error Message	Action Request DateTime
Forecast Revenue	Diane Briseno	Processing		10/28/2005 4:31:39:260 P

Add Reps To Opportunity action page

To add sales representatives to selected opportunities:

1. Select the opportunities to which you want to assign a sales representative.
2. Select the sales users.
3. Click Add Reps.
4. Review the results in the Review Status section.

Adding a Sales User Task

Access the Add Sales User Task action page.

Add Sales User Task

Step 1: Select Sales Users

Filters ALL ▼
Filters ALL ▼
Filter

	Sales User	Business Unit	Person ID
<input type="checkbox"/>	Stu Marx	US200	0011
<input checked="" type="checkbox"/>	Alex Ash	US200	1001
<input type="checkbox"/>	Ian Steward	US200	1002

Step 2: Add Task Details

Task Details

Task Type

Start Date

Subject

Priority

End Date

Create Task

Step 3: Review Status

Sales User	Task Subject	Start Date	Action Status	Action Error Message
Alex Ash	Check inventory levels	7/26/2005 9:00:00 AM		
Alex Ash		7/26/2005 9:00:00 AM		

Add Sales User Task action page

To add task details to selected sales users:

1. Select the sales users to whom you want to assign tasks.
2. Enter the task details using the fields in the Add Task Details section.
3. Click Create Task.
4. Review the results in the Review Status section.

Sending Email to High Performer Sales Representatives

Access the Email High Performer Sales Reps action page.

Email High Performer Sales Reps

Step 1: Select Rep to Email by Clicking on Row

Sales User	Person ID	Sales User Type
Alan Bailey	598	FLDR

Filters: Alan Bailey ALL

Step 2: Compose Email

Email Recipients

To: Alan Bailey

CC:

BCC: (Enter other recipient email addresses.)

Template:

Subject:

Step 3: Confirmations

Recipient	Action Status	Action Error Message
Alan Bailey	Submitted	

Email High Performer Sales Reps action page

To send email to sales representatives who are performing at a high level:

1. Select the representatives to whom you want to send an email.
2. Compose the email using the fields in the Compose Email section.
3. Click Send.
4. Review the results in the Confirmations section.

Notifying a Primary Representative About an Opportunity

Access the Email Opportunity Primary Rep action page.

Email Opportunity Primary Rep

Step 1: Select Opportunity by Clickin... Filters ALL ALL ALL Filter

Opportunity ID	Opportunity	Sales Rep Name	Opp Forecast Total A	Business Unit Code	Customer
20020087	Hardware	Frank Peterson	150,000.00	US300	Medical Center
200300001	Global Payment hardware	Frank Peterson	150,000.00	US300	Global Payment Network
200300001	Haas - Cafeteria Project	Burt Lee	0.00	APP01	Haas Engineering
200300001	Arnold - Custom	Tommy Murphy	0.00	APP01	Arnold Ice Company

Step 2: Compose Email

Email Recipients

To: Burt Lee

CC:

BCC: (Enter other recipient email addresses.)

Template: RSF:High Perf Agent

Subject: High Performer Status

Message: Dear Burt Lee:
Congratulations on attaining the status of high performer. Keep up the great work.

Step 3: Confirmations

Recipient	Opportunity ID	Action Status	Action Error Message
Burt Lee	200300001	Submitted	

Email Opportunity Primary Rep action page

To email opportunities to primary sales representatives:

1. Select the opportunities for which you want to email to the new primary representative.
2. Compose the email using the fields in the Compose Email section.
3. Click Send.
4. Review the results in the Confirmations section.

Drilling to an Opportunity in Pure Internet Architecture

Access the Opportunity Drill To PIA action page.

Opportunity Drill To PIA

Action List Filters ALL ALL Filters

<input type="checkbox"/>	Opportunity	Customer	Opportunity ID	Business Unit Code	Sales Rep Name
<input type="checkbox"/>	Actual revenue	BJ's Appliance Center	200300094	APP01	Burt Lee
<input type="checkbox"/>	Alan Task Oppy	Shoreview Medical	200300080	APP01	Burt Lee
<input type="checkbox"/>	ALAN OPPY TASK	Shoreview Medical	200300081	APP01	Burt Lee
<input type="checkbox"/>	ALAN MIGHTY CLOSED OI	Shoreview Medical	200300082	APP01	Burt Lee
<input type="checkbox"/>	ALAN NEW OPEN OPPY	Arnold Ice Company	200300087	APP01	Burt Lee
<input type="checkbox"/>	Arnold Touch Oppy	Arnold Ice Company	200300088	APP01	Burt Lee
<input type="checkbox"/>	Forecast Revenue	Arnold Ice Company	200300093	APP01	Burt Lee

Opportunity Drill To PIA action page

To access the opportunity pages in PeopleSoft Sales:

1. Use the filters to display the opportunities that you want to access.
2. Select the link that is associated with the opportunity that you want to access.

The system displays the Opportunity page in PeopleSoft Sales.

Reassigning a Lead

Access the Reassign Leads action page.

Reassign Leads

Step 1: Select Leads Filters ALL

	Lead	Customer	Sales Rep Name	Lead ID	Business Unit Code
<input type="checkbox"/>	ALAN TASK LEAD	Shoreview Medical	Burt Lee	1000300368	APP01
<input checked="" type="checkbox"/>	ALAN LEAD TASK	Shoreview Medical	Burt Lee	1000300369	APP01
<input type="checkbox"/>	Arnold Touch Lead	Arnold Ice Company	Burt Lee	1000300371	APP01

Step 2: Select New Primary Rep

	Sales User	Person ID
<input type="radio"/>	Steve Elway	200002
<input checked="" type="radio"/>	Pat Ziller	300098
<input type="radio"/>	Stuart Edwards	1003
<input type="radio"/>	Luke Quincy	1004

Step 3: Review Status

Lead	Sales User	Action Status	Action Error Message
ALAN LEAD TASK	Pat Ziller	Processing	

Reassign Leads action page

To reassign selected leads to a new primary sales representative:

1. Select the leads for which you want to assign a new primary representative.
2. Select the new primary sales representative.
3. Click Reassign.
4. Review the results in the Review Status section.

Reassigning an Opportunity

Access the Reassign Opportunity action page.

Reassign Opportunity

Step 1: Select Opportunities							
				Filters	ALL	ALL	Filter
<input type="checkbox"/>	Opportunity	Customer	Sales Rep Name	Opportunity ID	Business Unit Code		
<input type="checkbox"/>	Activity 1	Shoreview Medical	Harry Singer	200300110	APP01	▲	
<input type="checkbox"/>	Activity 3	Shoreview Medical	Harry Singer	200300112	APP01		
<input type="checkbox"/>	Activity 2	Arnold Ice Company	Harry Singer	200300111	APP01		
<input checked="" type="checkbox"/>	Forecast Revenue	Arnold Ice Company	Burt Lee	200300093	APP01		
<input type="checkbox"/>	Missed1	MMA Property Managemen	Stu Marx	200300115	US200	▼	

Step 2: Select New Primary Rep	
Sales User	Person ID
<input type="radio"/> Stuart Edwards	1003
<input type="radio"/> Luke Quincy	1004
<input checked="" type="radio"/> Peter Martin	1005
<input type="radio"/> Steve Moss	100890

Step 3: Review Status			
Opportunity	Sales User	Action Status	Action Error Message
Forecast Revenue	Peter Martin	Processing	

Reassign Opportunity action page

To reassign selected opportunities to a new primary sales representative:

1. Select the opportunities for which you want to assign a new primary representative.
2. Select the new primary sales representative.
3. Click Reassign.
4. Review the results in the Review Status section.

Updating a Lead Priority

Access the Update Lead Priority action page.

Update Lead Priority

Step 1: Select Leads							Filters	ALL	ALL	Filter
<input type="checkbox"/>	Lead	Customer	Sales Rep	Lead ID	Sales Priority	Business Unit				
<input type="checkbox"/>	Shoreview - Researc	Shoreview Medical	Dom Bosworth	1000300049	5	APP01				
<input type="checkbox"/>	Shoreview Medical	Shoreview Medical	Henry Emman	1000300026	5	APP01				
<input type="checkbox"/>	BJ's - Walk in freeze	BJ's Appliance Cente	Henry Emman	1000300033	5	APP01				
<input checked="" type="checkbox"/>	Arnold Ice - Freezer	Arnold Ice Company	Jim Majors	1000300043	5	APP01				
<input type="checkbox"/>	Cold Storage Solutio	Shoreview Medical	Terry Murphy	1000300358	5	APP01				

Step 2: Select New Priority	
Sales Priority Code	
<input checked="" type="radio"/>	1
<input type="radio"/>	2
<input type="radio"/>	3
<input type="radio"/>	4
Update Lead Priority	

Step 3: Review Status			
Lead	Sales Priority	Action Status	Action Error Message
Arnold Ice - Freezer equipments	1		

Update Lead Priority action page

To update the priority on selected leads:

1. Select the leads for which you want to change the priority.
2. Select the new sales priority code.
3. Click Update Lead Priority.
4. Review the results in the Review Status section.

Updating an Opportunity Priority

Access the Update Opportunity Priority action page.

Update Opportunity Priority

Step 1: Select Opportunities							Filters
							ALL ▼
							ALL ▼ Filter
<input type="checkbox"/>	Opportunity	Customer	Sales Rep Name	Sales Priority	Opportunity ID	Business Unit	
<input type="checkbox"/>	Valley Health Hardw.	Valley Health Medica	Frank Peterson	1	20020086	US300	▲
<input type="checkbox"/>	Global Payment harc	Global Payment Netv	Frank Peterson	2	20020087	US300	▲
<input checked="" type="checkbox"/>	Lakeview Freezer	Lakeview Communit	Sam Rabbitt	7	200300015	US200	▲
<input type="checkbox"/>	Vocal Group - Produ	Vocal Group	Carol Gomez	5	200300045	COM01	▲
<input type="checkbox"/>	Softgear - DSL	Softgear Inc.	Carol Gomez	5	200300022	COM01	▼

Step 2: Select New Priority	
Sales Priority Code	
<input checked="" type="radio"/> 1	▲
<input type="radio"/> 2	
<input type="radio"/> 3	
<input type="radio"/> 4	
<input type="radio"/> 5	▼
Update Priority	

Step 3: Action Request Status				
Opportunity	Sales Priority	Action Status	Action Error Message	Action Request DateTime
Lakeview Freezer	1	Processing		10/20/2005 5:42:13:207 P

Update Opportunity Priority action page

To update the priority on selected opportunities:

1. Select the opportunities for which you want to change the priority.
2. Select the new sales priority code.
3. Click Update Priority.
4. Review the results in the Action Request Status section.

CHAPTER 6

Using the PeopleSoft Enterprise Order Capture Dashboard

This section provides overviews on the Order Capture Dashboard application and order capture dashboard data and discusses how to:

- Set up hold and business project predictions for PeopleSoft Order Capture.
- Set up order capture targets.
- Use the summary page to access discovery reports for PeopleSoft Order Capture.
- Use the order history discovery dashboard pages.
- Use the order revenue discovery dashboard pages.
- Use the order throughput discovery dashboard pages.
- Use the order capture time to deliver discovery dashboard pages.
- Execute actions from the order capture discovery dashboard pages.
- Use the failed action pages.

Understanding the Order Capture Dashboard Application

The section discusses:

- Actions.
- Alerts.
- Summary reports.
- Discovery reports.
- Setting up and running history plans.
- Summary calculations.

Actions

These actions are delivered as part of the Order Capture Dashboard solution:

- Cancel orders
- Change delivery methods
- Change requested arrival dates
- Override business project steps

- Override holds
- Send mail
- Substitute products
- Drill into order
- Resubmit failed action

Alerts

These alerts are delivered with the Order Capture Dashboard solution:

- Alert user to process bottlenecks
- Alert user of excessive revenue on hold
- Alert user of high value late orders for a single customer
- Alert user of failed action

Note. PeopleSoft CRM delivers a number of alerts with the Order Capture Dashboard. These alerts are an indication of the functionality that is made possible by the Order Capture Dashboard. PeopleSoft anticipates that most customers who license and use the dashboard will use the alert wizard in Oracle BAM to create alerts specific to their business processes.

Summary Reports

The Order Capture Summary page displays these elements and compares them to fixed targets as well as the attainment of those targets:

Section	Description
Time to delivery	Displays information regarding late orders, on time orders, and orders that are predicted to be late.
Recognized revenue (quarter)	Displays information on revenue that is expected to be completed by the end of the quarter. It shows total revenue that has been attained for the quarter and revenue that is in the process of being completed. The Total Revenue in Process report, however, displays all the revenue that is in the process of completing, regardless of the quarter that it's expected to be completed in.
Throughput	Displays information regarding the processing of completed, incomplete, and new orders.
Potentially late revenue	Displays the sum of all recurring revenue lost by not delivering the order on the scheduled day.
Late orders	Displays the count of late orders by the number of days they are estimated to deliver in

Discovery Reports

These reports are included in the Order Capture Dashboard to assist users in the discovery process related to order processing, revenue, and throughput:

Report	Description
Order History	Measures the number of orders processed each day in the last 5 days, the average order completion time in hours, and the order capture history for both orders and revenue.
Order Revenue	Shows the number of orders expected to complete, the total attained revenue for specific periods, and the total amount of revenue that is in the process of being recognized, regardless of the quarter that it's expected to be completed in.
Order Throughput	Shows the number of completed orders, the number of orders that are in the process of being completed, and the number of new orders.
Order Capture Time to Deliver	Shows the number of late orders, the number of orders that are on time, and the number of orders that are predicted to be late.

Setting Up and Running History Plans

These history plans are set up to run nightly:

- OCD.History.Daily BP History
- OCD.History.Daily Hold History
- OCD.History.Daily Order History

These plans are triggered by alerts. To reduce the load on the system, you should set the time to run these plans when the load on the system is minimal (for example, in the middle of the night).

Summary Calculations

The OCD.Summary Calculations plan runs at intervals of about 5 minutes. This plan updates work tables used for alerts and data for report.

You can set the frequency of this plan in the monitoring properties of the plan, depending on how frequently users would like the data updated.

See Also

Oracle BAM Active Studio User's Guide

Oracle BAM Architect User's Guide

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, "Setting Up the Dashboard," Initiating a Batch Data Load

Chapter 4, "Loading Dashboard Data," page 15

Understanding Order Capture Dashboard Data

This section discusses:

- Submission of orders.
- Canceling orders.
- Starting a business project.
- Changing the code for a business project.
- Predicting order delivery dates.
- Calculated revenue.
- Twenty-four hour time windows.

Submission of Orders

When the user clicks the Submit button on an order, the system:

- Initiates hold checking.
- Launches business projects.

These two actions are transparent to the user. To understand how to track orders after submission, you need to carefully distinguish between them. It's also important to note that hold checking and business projects are done sequentially (the order only moves to the business projects after hold checking is completed successfully).

Holds are basic checks on the order to make sure important information is present on the order. Holds are based on capture type and setID. Holds can be on the line level (for example, a product is not in the catalog) or at the header level (for example, an order doesn't have a sold-to-contact).

If any holds are evaluated to be true during hold checking, then the order goes on hold. Nothing else is done to the order until all of the holds are fixed and the order is resubmitted.

You can resolve holds by either fixing the problem (for example, adding a sold-to contact to the order) or by merely overriding them (effectively saying that the hold condition is no longer important for this order).

Permission to override holds is granted based on the roles associated with the user's ID, so not every one will have the ability to override every hold.

Business projects are operations performed on the system in batch mode using the process scheduler. Business projects are subdivided into activities. Activities, in turn, are subdivided into tasks. Examples of tasks are sending an order confirmation email to the customer and creating installed products.

Each order can launch multiple business projects, based on its capture type and setID. The presence of certain products on an order can trigger additional business projects to run. However, when monitoring business projects, users will typically only concern themselves with the primary business project - the business project that actually sets the order to the completed status.

The capture type, business unit, and a few other characteristics of the order specify the initial activity in the business project. After that activity is performed, the business project transitions to a new activity based on whether the previous activity was performed successfully, timed out, and so on.

Each task in the activity is performed even if it is not directly relevant to the order. For example, there is a task in the core order business project to create an installed product. That task will start by querying the database to see if any installed products need to be created. If any installed products need to be created, they will be created. If not, the task is marked as successful and the business project proceeds to the next task.

Another important characteristic of business projects is that they exist at the header level and not at the line level (with the exception of the product-triggered business projects mentioned above). The business project begins a task by checking with the database to determine if any action needs to be performed. If an action is necessary, it loops over the lines that require the action. If no action is necessary, it proceeds to the next task. This means that a whole order can be stopped because a single line stops the business project from running. It also makes tracking the status of an order a little more demanding.

Note. In this release of the Order Capture dashboard solution, the system only supports the monitoring of users actions against new orders and service management orders. Financial Service Industry (FSI) orders are not supported by the dashboard system in this release.

Canceling Orders

When you cancel an order, it is removed from the dashboard completely. All line, header, and hold, information is eliminated. However, if the daily history reports were run before the order was cancelled, then the information from the cancelled order remains in the daily history reports. In addition, cancelled orders are not sent to the dashboard during initial load.

Starting a Business Project

Business projects are launched immediately after hold checking is completed. It doesn't matter if the requested arrival date is the next day or in five months (the typical example is ordering a Christmas present in May).

For a case where the requested arrival date is far in the future, the fulfillment system waits until the appropriate lead time for the arrival date and then starts processing the order. As a result, the business project could take an extremely long time while it waits on a response from the fulfillment system, even though nothing was really wrong.

In this case any averages of task completion times and any associated predictions of task completion times are skewed.

An additional facet of business projects is that certain products on an order can trigger sub-business projects. These projects are run in series with the main business project and must be accounted for in the computations of estimated delivery times.

As orders flow through and sub-business projects are monitored in the Order Capture Dashboard, you can only view the current step the order is in. You can not distinguish between parent and sub-business projects (and the steps that comprise them). If you need to understand in greater detail a specific order's progress in the context of the entire business project, you can transfer to the appropriate pages in the CRM database to review the orders status in detail.

Changing the Code for a Business Project

Business projects utilize a free-form structure. This is both an advantage and a disadvantage. This free-form structure allows business projects to be a powerful tool. But it also means that metadata does not exist to describe certain aspects of them.

There are several pieces of information that do not exist in the metadata that you might need to change:

- Determining primary business projects.

For the purpose of figuring out how long a business project will take to complete, the system only looks for business projects that are deemed *primary*. These business projects actually change the order status to *Complete*. The other business projects, which are called *Secondary* only do things like send out correspondence email. To determine whether a business project is primary or secondary, the system keeps a list of secondary business projects. Any business project that is not secondary is considered primary (table = RO_PRIMARY_BP).

- Adding new business project starting criteria.

When an order is on hold, the system needs to determine how long the business project will take to run. To determine this, the system needs to know which business project will run. This information is stored in the RO_PROCESS_MAP table. For each process type (RO_PROCESS_TYPE) and capture type (CAPTURE_TYPE), this table shows what event will be run. This information is determined by PeopleCode and must be maintained in parallel with this PeopleCode. The criteria for which a business project will run is located in PeopleCode in RO_CAPTURE:BusinessLogic:DynamicEvents:BusinessProjectHandler.

These criteria use the properties of the order to determine which business project to run. Because the order changes properties between when it is on hold and when the business project actually fires (namely, the order header status changes), PeopleSoft has built a simplified model that determines what business project will run. It is only used by the time estimation process for orders on hold to figure out which business project will run when the holds are fixed.

- Storing time periods.

Since there is not an efficient way to store time periods that are used extensively in the dashboard calculations, PeopleSoft has coded calendar year quarters:

- Quarter 1 = January to March
- Quarter 2 = April to June
- Quarter 3 = July to September
- Quarter 4 = October to December

Predicting Order Delivery Dates

The dashboard relies on the past order completion data to estimate predicted order completion duration. As orders move through the business projects in the system's back end, the system captures the start and stop times for the different tasks in the business projects.

This data is analyzed to determine how the orders with certain products will complete in the future. The delivery time for an order can be skewed, however, in cases where one or more products are quickly fulfilled, while other products on the same order have a much longer lead-time.

Users should be informed about this, particularly for long-term, recurring types of orders. For example, assume the customer orders an allotment of light bulbs to be packaged and shipped 500 at a time every 3 months. Such an order would adversely impact the average completion time because, though the products are shipping and the order is processing as expected, the actual fulfillment date is much further into the future.

It is recommended that users split such orders whenever possible to maintain a more accurate average. As an order is processed in PeopleSoft Order Capture, it is recording the start and stop points for all the actions it takes in the back-end business project. Based on this data, the system computes averages for every task and business project in the system.

Here are the elements that are pertinent to this process:

Element	Description
Task ID	The unique Task ID for the step in the business project.
Estimated Task Duration	The amount of time, based on past averages, it will take for the order to complete this step.
Estimated Task-To-Order Duration	The amount of time, based on past averages, it will take for this order to go from the beginning of this task to the end of the business project.

PeopleSoft Order Capture is in charge of maintaining this information. It communicates the estimated task duration and estimated task-to-order duration to the dashboard whenever a task is completed. Using these averages, the dashboard can compute the predicted fulfillment date of orders.

Calculated Revenue

Revenue-related reports in the Order Capture Dashboard display the value of an order to a user. In different businesses the value of an order may mean different things, however.

In a product-related business the value of an order is simply the fixed revenue on the order. In many services-related industries an order for a service may only have recurring charges that represent the value of the order to the user.

In an attempt to make the reports in the dashboard as flexible as possible, the idea of an *Include Recurring Revenue* flag on the targets table is used to enable customers to determine if recurring revenue on an order is valuable to them.

If the *Include Recurring Revenue* flag is set to *1* the recurring revenue on an order is included in the calculation. If the value is *0*, recurring revenue is not included.

There is also a concept of *lost revenue* for service companies. The *Pro Rate Recurring Revenue* flag on the targets table enables the users to decide if they want to pro rate the recurring revenue based on the number of days late when displaying the reports or just take all the recurring revenue for the period as lost. Valid values for this are *Y* or *N*.

See *Oracle BAM Active Studio User's Guide*

Twenty-Four Hour Time Windows

When dealing with real-time data reporting in the dashboard, it is important to understand that the time frame by which many reports are factored is a true 24-hour period. This means reports viewed at the beginning of a business day are reporting data from the prior business day.

This style of reporting is necessary to achieve a consistent data sample to recognize trends in normal operating procedures. By using a 24-hour time window, the user operates on the assumption that life in the back office is cyclical.

For example, if a business, which is expected to do an average of 2000 new orders per day, were to only factor in the orders accepted that day, it would be difficult for an operator to understand if they were experiencing an increase in incoming orders until they had actually surpassed 2000 orders for the day.

By measure a sliding 24-hour window, however, the user can view a constant count on orders coming into the system. This methodology of measurement enables dashboard users to detect fluctuations in the overall pattern of business in a more rapid manner.

Setting Up Hold and Business Project Predictions for PeopleSoft Order Capture

To set up hold and business project predictions for PeopleSoft Order Capture, use the Hold Predictions (OCD_HOLD_TIME) and Business Project Predictions (RO_BP_TIME) component.

This section discusses how to:

- Set up hold predictions.
- Set up business project predictions.

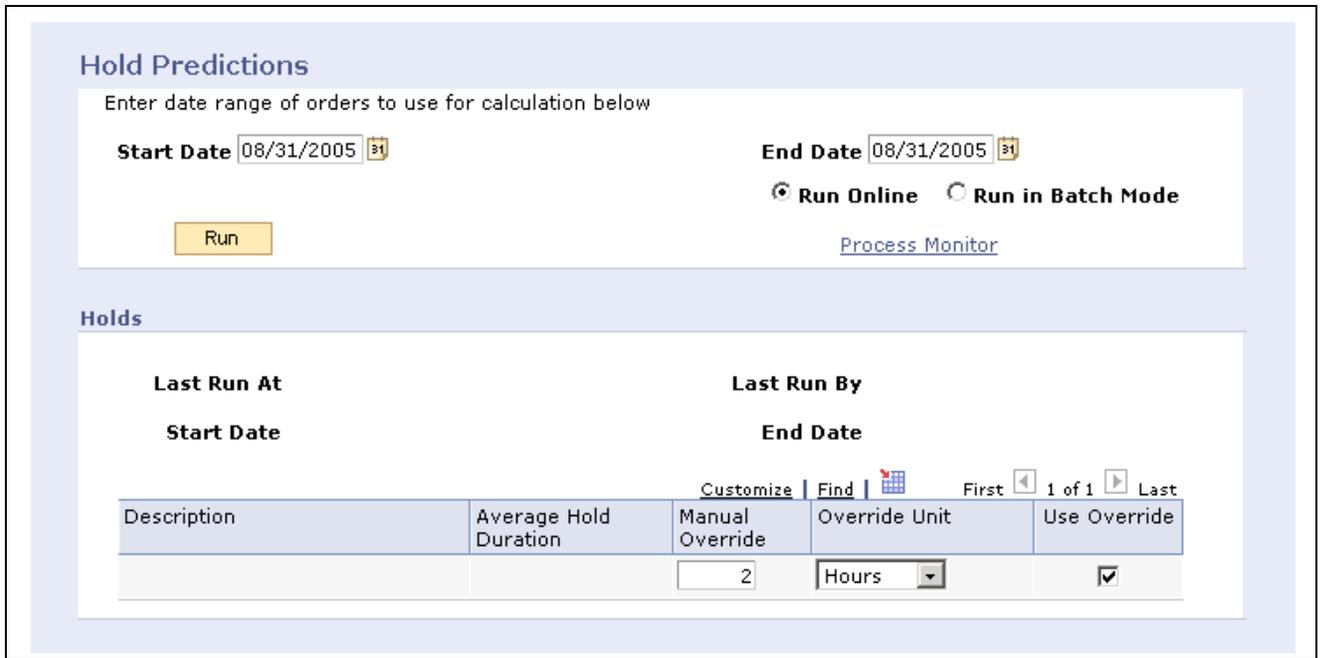
Note. You must run the Hold Predictions and Business Project Predictions Application Engine programs described in this section before you begin an initial data load.

Pages Used to Set Up Hold and Business Project Predictions for PeopleSoft Order Capture

Page Name	Object Name	Navigation	Usage
Hold Predictions	OCD_HOLD_TIME_PG	Set Up CRM, Product Related, Dashboard, Order Capture Dashboard, Hold Predictions	Provide the system with information on which to perform calculations regarding predicted hold durations.
Business Project Predictions	RO_BP_TIME_PG	Set Up CRM, Product Related, Dashboard, Order Capture Dashboard, Business Project Predictions	Provide the system with information on which to perform calculations regarding business project predictions.

Setting Up Hold Predictions

Access the Hold Predictions page.



Hold Predictions page

- Start Date and End Date** Enter the date range in which orders were processed to provide the system with information on which to perform calculations regarding predicted order completion durations.

- Run Online** Select this option to run the process immediately.
- Run in Batch Mode** Select this option to run the process using the process scheduler
- Run** Click this button to initiate the process to load data to calculate hold predictions.
- Process Monitor** Click this link to access the process monitor, where you can view the status of the job being run.
- Last Run At, Last Run By, Start Date and End Date** These fields are display only. They are used to indicate the dates and times the last job was run, who ran it, and the start and end dates that were used.
- Manual Override, Override Unit and Use Override** Use these fields to override the computed averages with your own values. For example, if you know a particular hold is suddenly fixed faster than it has been in the past, you can manually change the average time instead of waiting for computed averages to reflect the change.

Setting Up Business Project Predictions

Access the Business Project Predictions page.

Business Project Predictions

Enter date range of orders to use for calculation below

Start Date

End Date

Run All BPs
 Run Selected BPs
 Run Online
 Run in Batch Mode

 [Process Monitor](#)

Business Projects Find | [View All](#) First 1 of 16 Last

Business Project Submit Bulk Order Children **Status** Active

Ave. BP Time 3mins. 19secs. **Last Run At** 06/07/2005 11:20AM

Start Date 06/07/2000 **Last Run By** VKUMAR

End Date 06/07/2005 **Select for Running BP**

Phases and Tasks

Item	Description	Average Phase Duration	Average Task Duration	Manual Override	Unit	Use Override	Average Time to Finish BP
▼Phase	Generate Bulk Orders Phase	37secs.					3mins. 19secs.
Task	Generate Bulk Order Children		37secs.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	3mins. 19secs.
▼Phase	Submit Bulk Order Children	2mins. 42secs.					2mins. 42secs.
Task	Submit Bulk Child Orders		2mins. 42secs.	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	2mins. 42secs.

Business Project Predictions page

- Start Date and End Date** Enter the date range in which orders were processed to provide the system with information on which to perform calculations regarding business project predictions.
- Run All BPs** Select this option to run all business projects.
- Run Selected BPs** Select this option to run selected business projects.
- Run Online** Select this option to run the process immediately.
- Run in Batch Mode** Select this option to run the process using the process scheduler.
- Run** Click this button to initiate the process to load data to calculate hold predictions.
- Process Monitor** Click this link to access the process monitor, where you can view the status of the job being run.
- Business Project, Status, Ave. BP Time, Last Run At, Start Date, Last Run By, and End Date** These fields are display only. They are used to indicate the business project, status, the average business project time, dates and times the last job was run, who ran it, and the start and end dates that were used to move the data into the ADC.
- Select for Running BP** Select this check box to run the predictions for the business project that is displayed. Use the Show next row button at the top of the section to navigate to other business projects and select business projects to run in the process.

Manual Override and Unit For each phase of a business project, you can override the average task duration by entering the duration in the Manual Override field and the duration (*days, hours, minutes, or seconds*) in the Unit field.

Setting Up Order Capture Targets

This section discusses how to set up order capture targets.

Page Used to Set Up Order Capture Targets

Page Name	Object Name	Navigation	Usage
Setup - Order Capture Targets	Setup - Order Capture Targets	Click My Dashboard, Order Capture Targets	Establish targets and thresholds that you want the system to use when calculating information to display on the various discovery pages for PeopleSoft CRM Order Capture. Use this setup page to set up business units, back office capacity, orders in jeopardy, late orders, on time orders, recurring revenue, current quarter revenue, open order revenue, and pro-rated revenue. You can also establish target information for throughput of completed, in process and new orders.

Setting Up Order Capture Targets

Access the Setup - Order Capture Targets page.

Setup - Order Capture Targets

Target Values								Business Unit	ALL	Apply
<input type="checkbox"/>	Business Unit	Back Office Capacity	Orders in Jeopardy	Orders Late	Orders on Time	Recurring Revenue	Revenue Current Quarter	Revenue Open C		
<input type="checkbox"/>	APP01	300	1,000	75	200	1	600,000.00	60,000.00		
<input type="checkbox"/>	COM01	300	100	50	2,000	1	300,000.00	50,000.00		
<input type="checkbox"/>	EGNBU	300	100	50	2,000	1	300,000.00	50,000.00		
<input type="checkbox"/>	FED01	300	100	50	2,000	1	300,000.00	50,000.00		
<input type="checkbox"/>	IHT001	300	100	50	2,000	1	300,000.00	50,000.00		
<input type="checkbox"/>	STA01	300	100	50	2,000	1	300,000.00	50,000.00		
<input type="checkbox"/>	US001	300	10	5	20,000	1	3,000,000.00	700,000.00		
<input type="checkbox"/>	US200	300	100	50	2,000	1	300,000.00	50,000.00		
<input type="checkbox"/>		300	100	50	2,000	1	300,000.00	50,000.00		

Setup - Order Capture Targets page

Use the fields on this page to set up the targets and thresholds that you want the system to use to display dashboard information regarding the orders, revenue, throughput, and back office capacity that you are managing. The system uses the numbers that you enter to calculate and display information on the dashboards.

Note. Setup target information needs to be filled in if you want the system to calculate revenue and display it on the discovery reports.

Using the Summary Page to Access Discovery Reports for PeopleSoft Order Capture

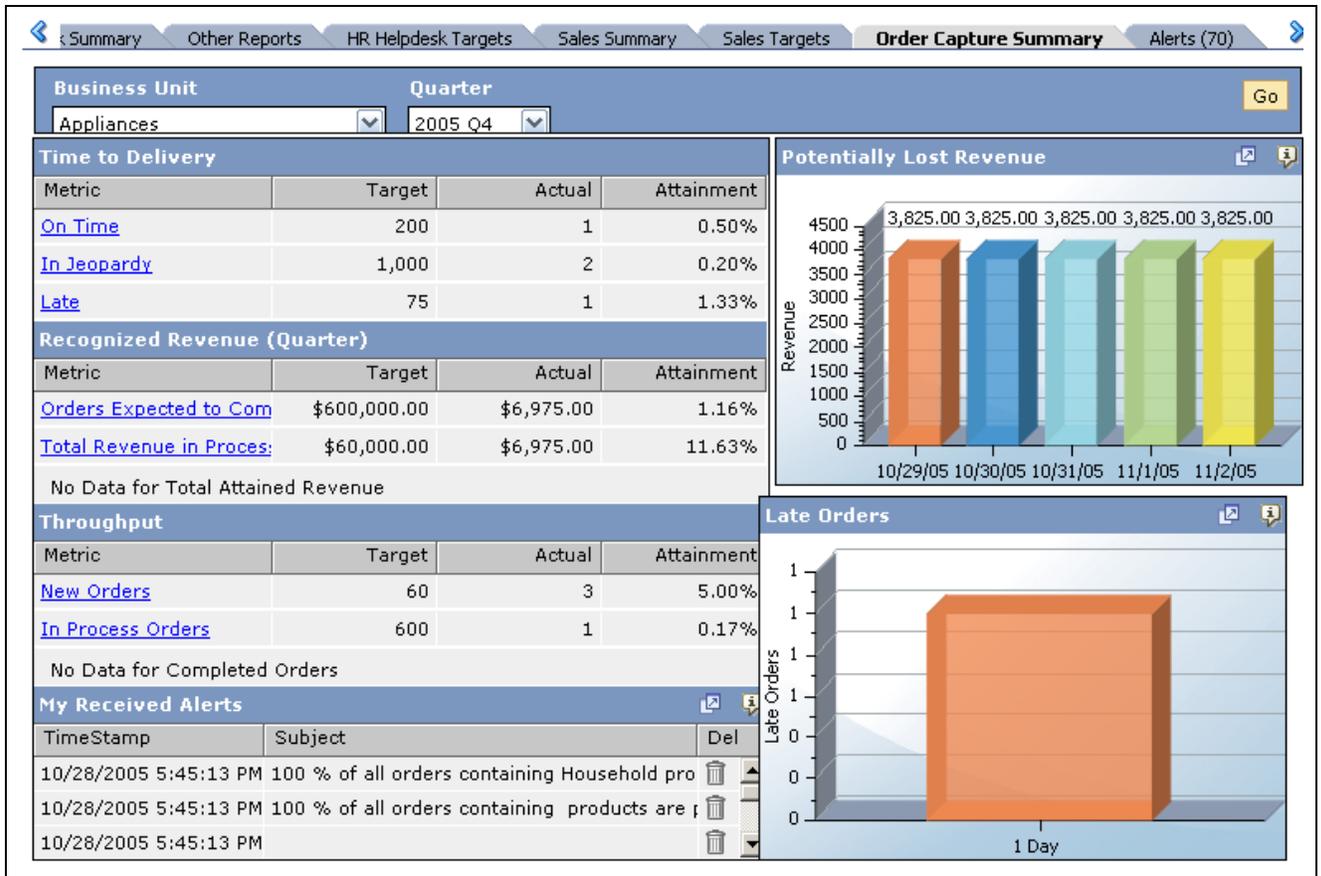
This section discusses how to use the summary page to view discovery reports for PeopleSoft CRM Order Capture.

Page Used to Access Discovery Reports for PeopleSoft Order Capture

Page Name	Object Name	Navigation	Usage
Order Capture Summary	Summary - Order Capture	Click My Dashboards, Order Capture Summary	View real-time information related to the operation of the your PeopleSoft CRM Order Capture application.

Using the Summary Page to Access Discovery Reports for PeopleSoft Order Capture

Access the Order Capture Summary page.



Order Capture Summary page

Time to Delivery

This section displays information regarding late orders, on time orders, and orders that are predicted to be late.

Recognized Revenue (Quarter)

This section displays information on revenue that is expected to be completed by the end of the quarter. It shows total revenue that has been attained for the quarter and revenue that is in the process of being completed. The Total Revenue in Process report, however, displays all the revenue that is in the process of completing, regardless of the quarter that it's expected to be completed in.

Throughput

This section displays information regarding the processing of completed, incomplete, and new orders.

My Received Alerts

This section displays information regarding alerts that you have set up to warn you of particular situations that are occurring within your operation.

Potentially Lost Revenue

This section displays the sum of all recurring revenue lost by not delivering the order on the scheduled day. Recurring revenue for each order equals the monthly recurring revenue multiplied by the number of days in a month plus the yearly revenue divided by 365. The graph displays five business days into the future.

Late Orders

This section displays the count of late orders multiplied by the number of days they are estimated to deliver in. For example, orders in the 1 column are scheduled to deliver in one day.

Using the Order History Discovery Dashboard Pages

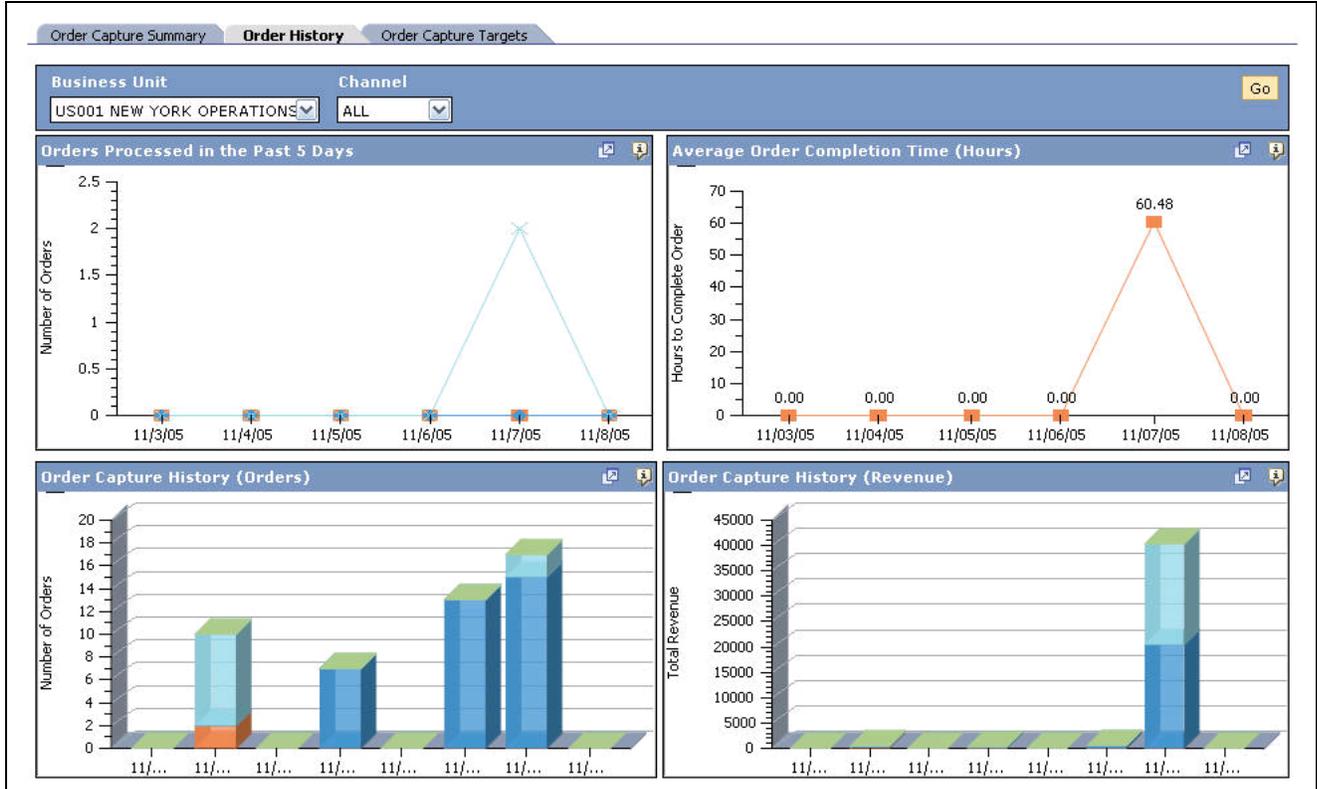
This section discusses how to use the Order History discovery report page.

Page Used to View the Order History Discovery Reports

Page Name	Object Name	Navigation	Usage
Order History	Discovery - Order History	Click My Dashboards, Order History.	Measure the number of orders processed each day in the last 5 days, the average order completion time in hours, and the order capture history for both orders and revenue.

Using the Order History Dashboard Discovery Report Page

Access the Order History discovery report page.



Order History discovery report page

Note. There can be a double counting in terms of statuses on the Order Capture History (Orders) and Order Capture History (Revenue) views where an order can be both *New* and *Late* at the same time.

Orders Processed in the Past 5 Days

This view measures the number of orders processed each day in the last 5 days. The X axis groups the report by date. The red line represents completed orders. The dark blue line represents orders that are in the process of being completed and the light blue line represents new orders.

Average Order Completion Time (Hours)

This view shows the average time it takes to complete an order in hours.

Order Capture History (Orders)

Using a bar graph this view illustrates the movement between the number of new, complete, late, and predicted late orders for the past five days.

Order Capture History (Revenue)

Using a bar graph, this view illustrates the movement in revenue between the number of new, complete, late and predicted late orders from the past five days.

Using the Order Capture Time to Delivery Discovery Dashboard Pages

This section discusses how to:

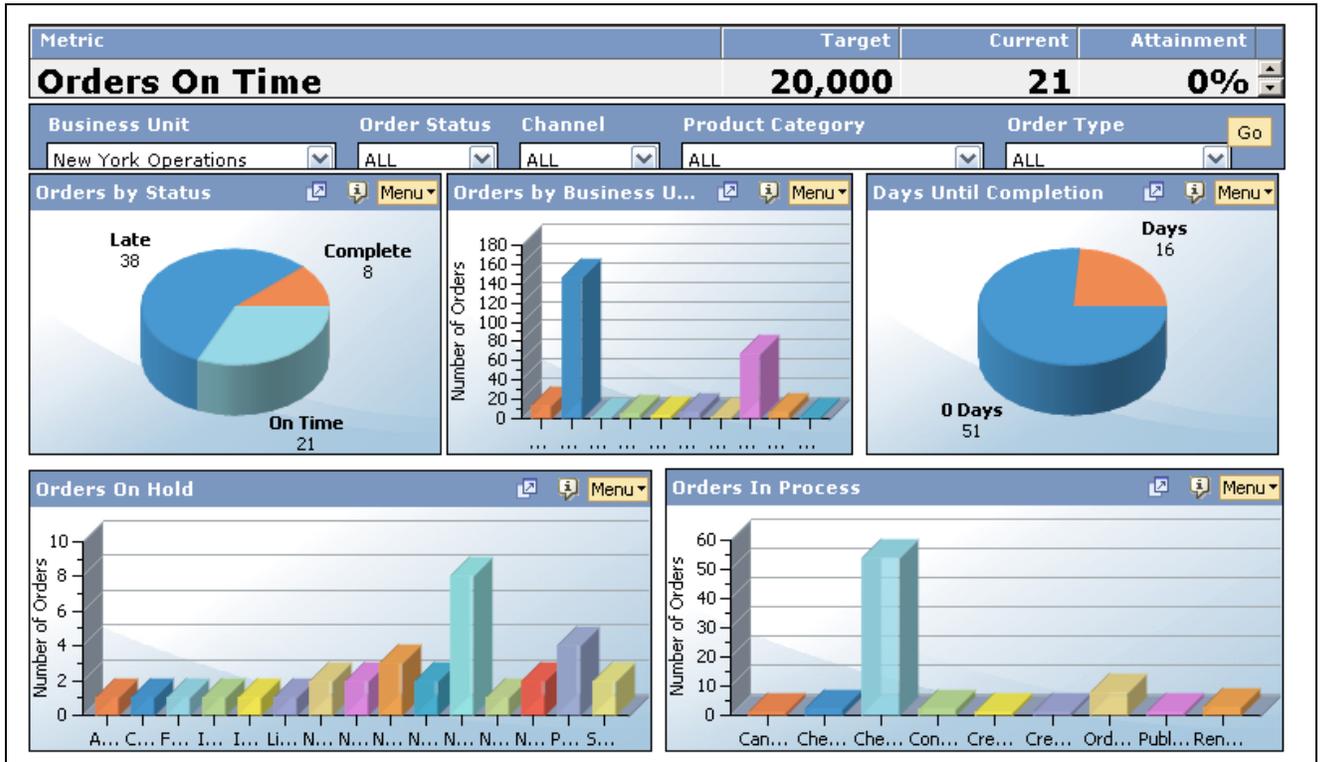
- Use the Orders On Time discovery report page.
- Use the Orders Predicted Late discovery report page.
- Use the Late Orders discovery report page.

Pages Used to View Order Capture Time to Delivery Dashboard Reports

Page Name	Object Name	Navigation	Usage
Orders On Time	Discovery - Time To Deliver - On Time	Click the On Time link in the Time To Delivery section on the Order Capture Summary page.	View the distribution of on-time orders in the system by their status, the number of open orders in the system organized by the associated business unit, and the expected number of orders that will be completed as specified by the global filters. You can also view the number of holds accounted for by the different hold types and view the business project step and the number of orders currently in that step.
Orders Predicted Late	Discovery - Time To Deliver - Predicted Late	Click the In Jeopardy link in the Time To Delivery section on the Order Capture Summary page.	View the distribution of orders that are predicted to be late in the system by their status, the number of open orders in the system organized by the associated business unit, and the expected number of orders that will be completed as specified by the global filters. You can also view the number of holds accounted for by the different hold types and view the business project step and the number of orders currently in that step.
Late Orders	Discovery - Time To Deliver - Late Orders	Click the Late link in the Time To Delivery section on the Order Capture Summary page.	View the distribution of late orders in the system by their status, the number of open orders in the system organized by the associated business unit, and the expected number of orders that will be completed as specified by the global filters. You can also view the number of holds accounted for by the different hold types and view the business project step and the number of orders currently in that step.

Using the Orders On Time Discovery Report Page

Access the Orders On Time discovery report page.



Orders On Time discovery report page

Note. All global filters affect these views, except for the Orders by Business Unit view, which is not affected by the business unit filter.

Orders by Status

This view displays, by default, the distribution of open orders that are on time. You can use the status filter, however, to view all orders. If you change the status from *On Time* to *All*, the change is reflected on the graph.

Orders by Business Unit

This view displays the number of open orders in the system organized by the associated business unit.

Days Until Completion

This view displays the expected number of days in which an order will be completed as specified by the global filters.

Orders on Hold

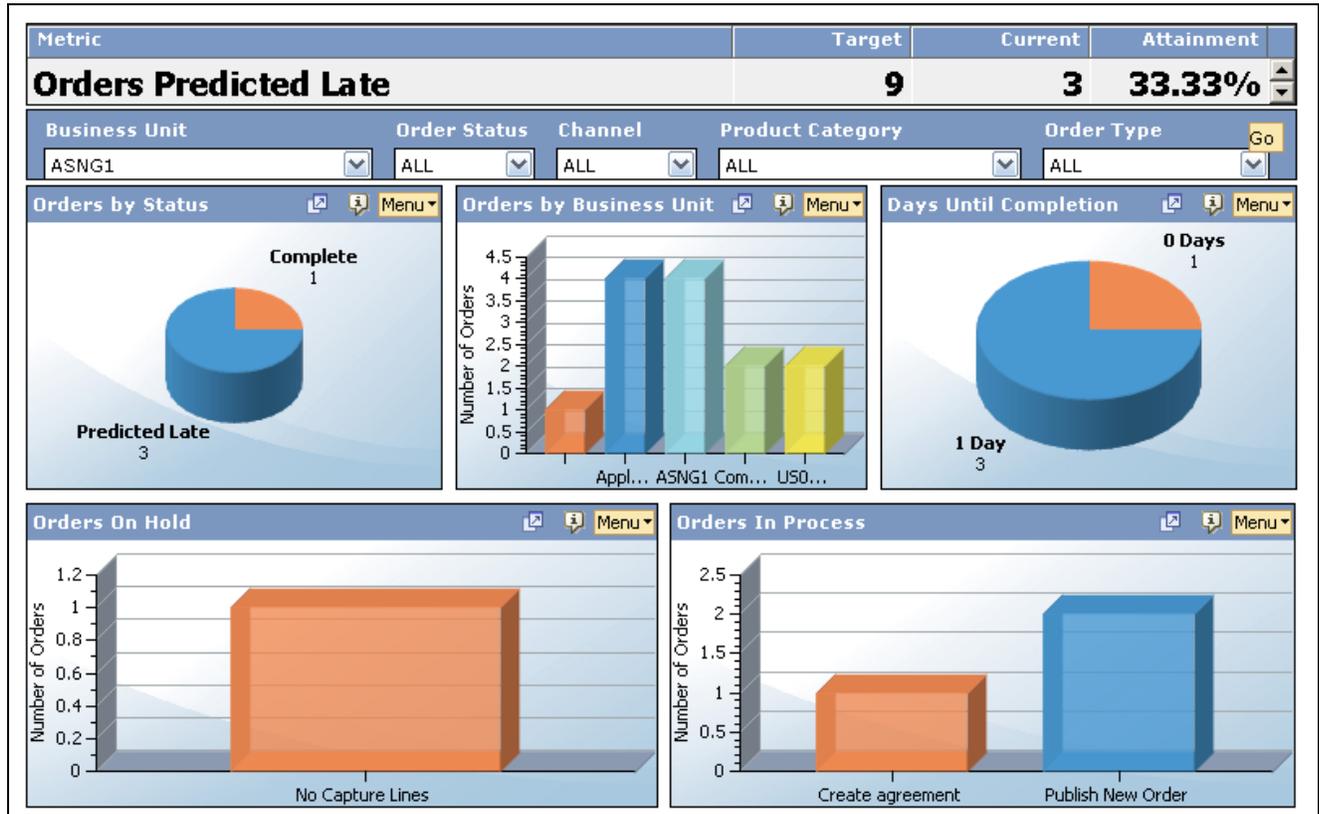
This view displays the number of orders on hold accounted for by the different hold types. Since orders may have more than one hold, the same order may be counted more than once.

Orders in Process

This view displays the business project step and the number of orders currently in that step.

Using the Orders Predicted Late Discovery Report Page

Access the Orders Predicted Late discovery report page.



Orders Predicted Late discovery report page

Note. All global filters affect these views, except for the Orders by Business Unit view, which is not affected by the business unit filter.

Orders by Status

This view displays, by default, the distribution of orders that are predicted to be late. You can use the status filter, however, to view all orders. If you change the status from *Predicted Late* to *All*, the change is reflected on the graph.

Orders by Business Unit

This view displays the number of open order in the system organized by the associated business unit.

Days Until Completion

This view displays the expected number of days in which an order will be completed as specified by the global filters.

Orders on Hold

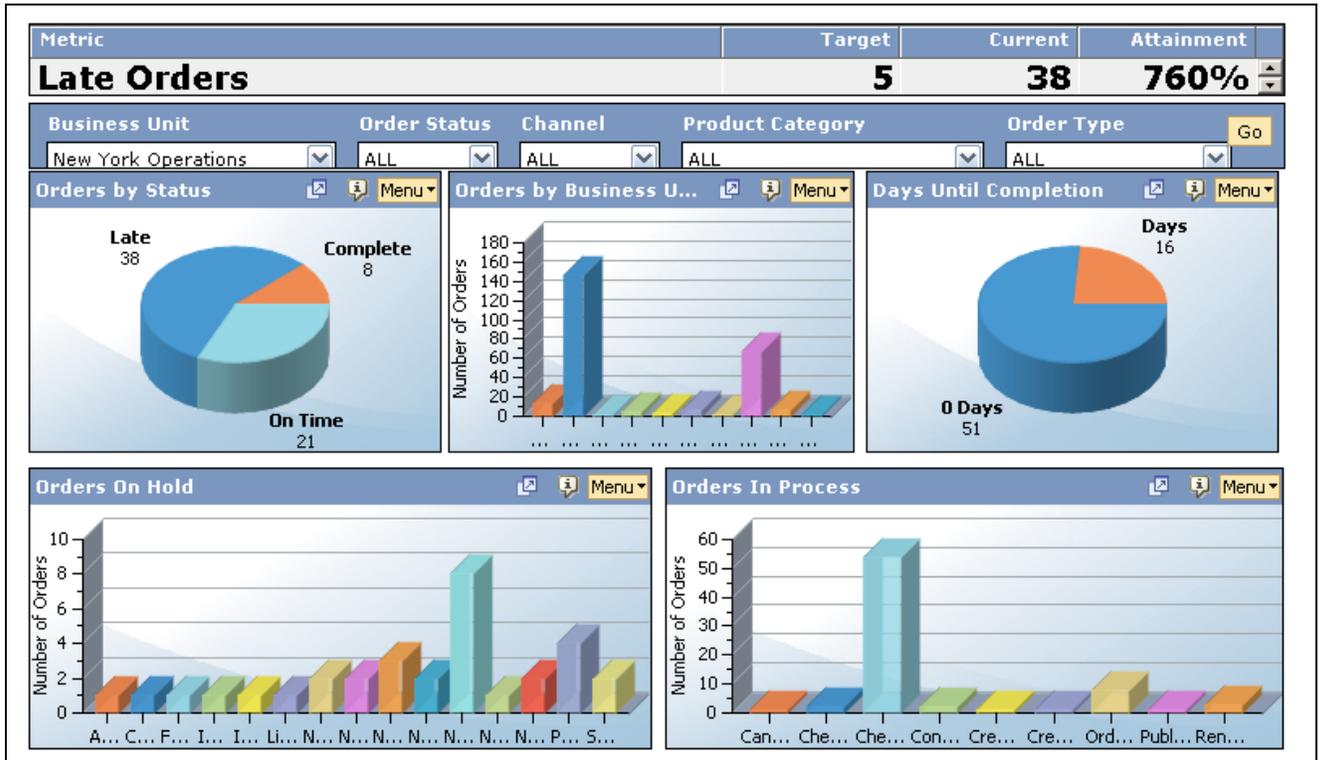
This view displays the number of holds accounted for by the different hold types. Since orders may have more than one hold, the same order may be counted more than once.

Orders in Process

This view displays the business project step and the number of orders currently in that step.

Using the Late Orders Discovery Report Page

Access the Late Orders discovery report page.



Late Orders discovery report page

Note. All global filters affect these views, except for the Orders by Business Unit report, which is not affected by the business unit filter.

Orders by Status

This view displays, by default, the distribution of open orders that are late. You can use the status filter, however, to view all orders. If you change the status from *Late* to *All*, the change is reflected on the graph.

Orders by Business Unit

This view displays the number of open orders in the system that are organized by the associated business unit.

Days Until Completion

This view displays the expected number of days in which an order will be completed as specified by the global filters.

Orders on Hold

This view displays the number of holds accounted for by the different hold types. Since orders may have more than one hold, the same order may be counted more than once.

Orders in Process

This view displays the business project step and the number of orders currently in that step.

Using the Order Revenue Discovery Dashboard Pages

This section discusses how to:

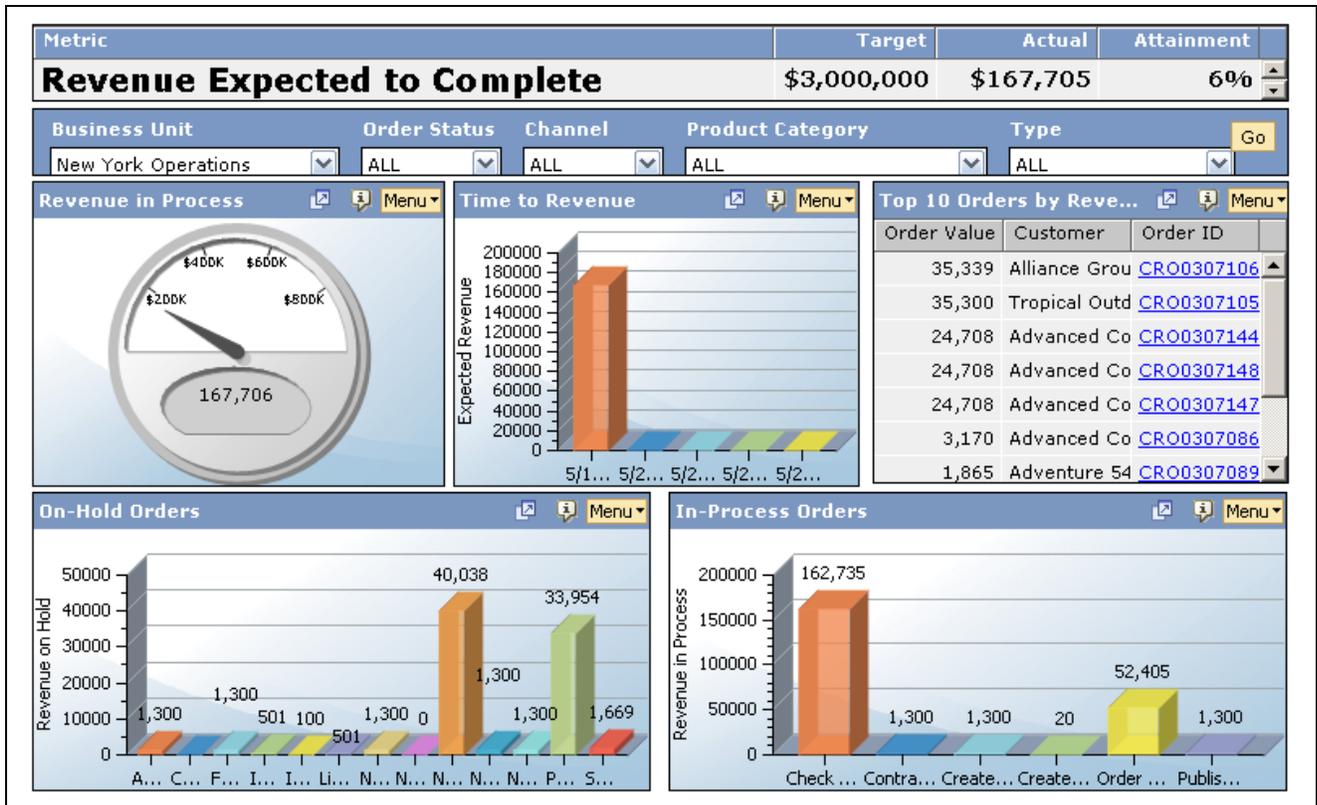
- Use the Revenue Expected to Complete discovery report page.
- Use the Total Revenue In Process discovery report page.
- Use the Total Attained Revenue discovery report page.

Pages Used to View the Order Capture Revenue Discovery Reports

Page Name	Object Name	Navigation	Usage
Revenue Expected to Complete	Discovery - Revenue - Expected to Complete	Click the Orders Expected to Complete link in the Recognized Revenue (Quarter) section on the Order Capture Summary page.	View the revenue in process, the amount of revenue expected to complete on a specific day, the top orders expected to complete, and the revenue amount of orders represented by the different hold categories. This dashboard also displays the revenue amount of orders represented by the different hold categories.
Total Revenue In Process	Discovery - Revenue - Total Revenue In Process	Click the Total Revenue in Process link in the Recognized Revenue (Quarter) section on the Order Capture Summary page.	View the amount of revenue expected to complete on a specific day, the top revenue generating orders in the system at the moment, the revenue amount of orders represented by the different hold categories, and the business project step and the revenue amount of the orders currently in that step.
Total Attained Revenue	Discovery - Revenue - Total Attained Revenue	Click the Total Attained Revenue link in the Recognized Revenue (Quarter) section on the Order Capture Summary page.	View the amount of revenue that has been attained for the quarter, the trend of revenue over the current quarter, the top revenue producing products for the total revenue earned by product over the current quarter, and the attained revenue for each product category.

Using the Revenue Expected to Complete Discovery Report Page

Access the Revenue Expected to Complete discovery report page.



Revenue Expected to Complete discovery report page

Revenue in Process

This view is the sum of order revenue for all open orders in the system according to the fixed target value and the attainment calculation (actual count divided by the target). The threshold that is set for this report is used for both the Orders Expected to Complete report and the Total Revenue In Process report.

Time to Revenue

This view displays the amount of revenue expected to complete on a specific day. The graph displays data for the next five days and is affected by all of the global filters.

Top 10 Orders by Revenue

This view lists of the top orders expected to complete. They appear in order by the revenue they will generate.

Note. This view does not change when you change global filters on this page.

On-Hold Orders

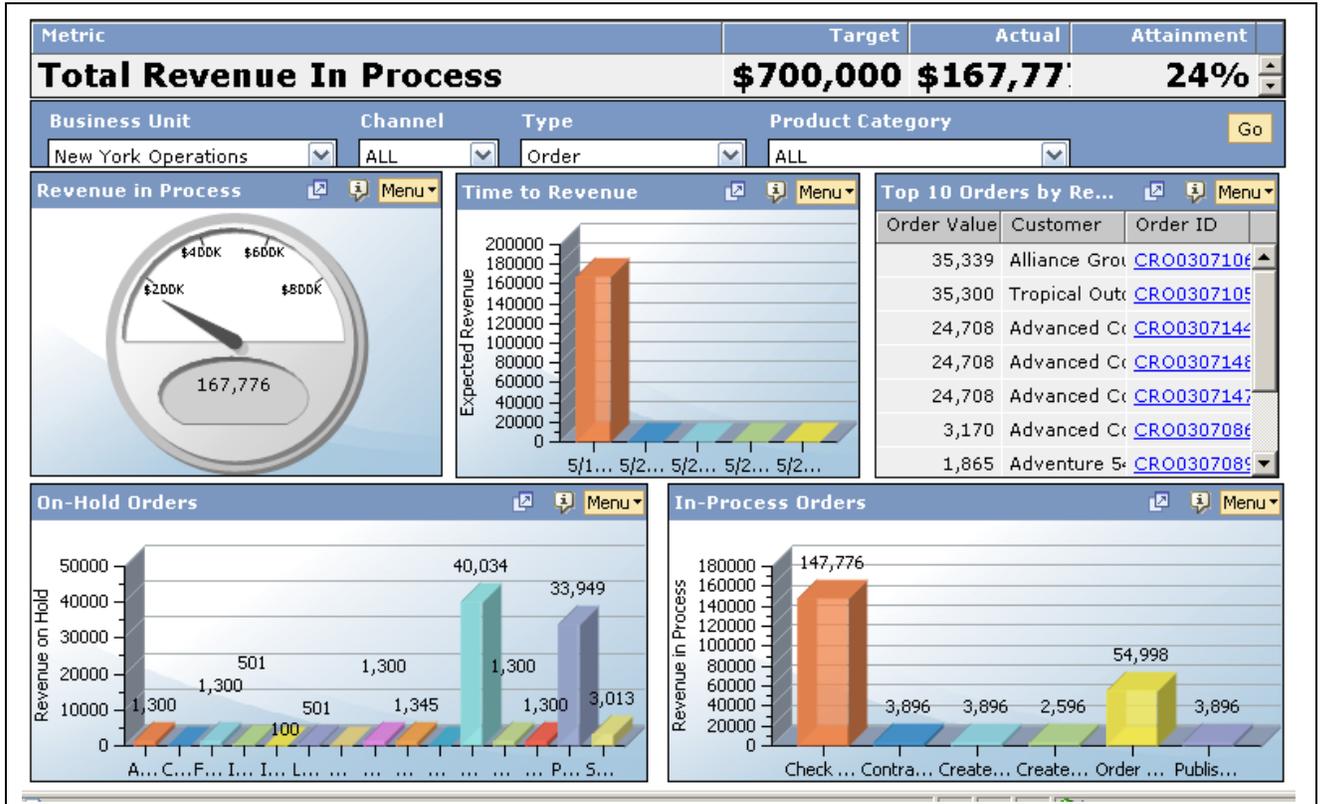
This view displays the revenue amount of orders represented by the different hold categories. Since orders may have more than one hold, the same order may be counted more than once. All global filters affect this view.

In-Process Orders

This view displays the business project step and the revenue amount of the orders currently in that step. All global filters affect this view.

Using the Total Revenue In Process Discovery Report Page

Access the Total Revenue In Process discovery report page.



Total Revenue In Process discovery report page

Revenue in Process

This view is the sum of order revenue for all open orders in the system according to the fixed target value and the attainment calculation (actual count divided by the target). The threshold that is set for this report is used for both the Orders Expected to Complete report and the Total Revenue In Process report.

Time to Revenue

This view displays the amount of revenue expected to complete on a specific day. The graph displays data for the next five days and is affected by all of the global filters.

Top 10 Orders by Revenue

This view displays the top revenue generating orders in the system at the moment. The list is affected by all of the global filters.

On-Hold Orders

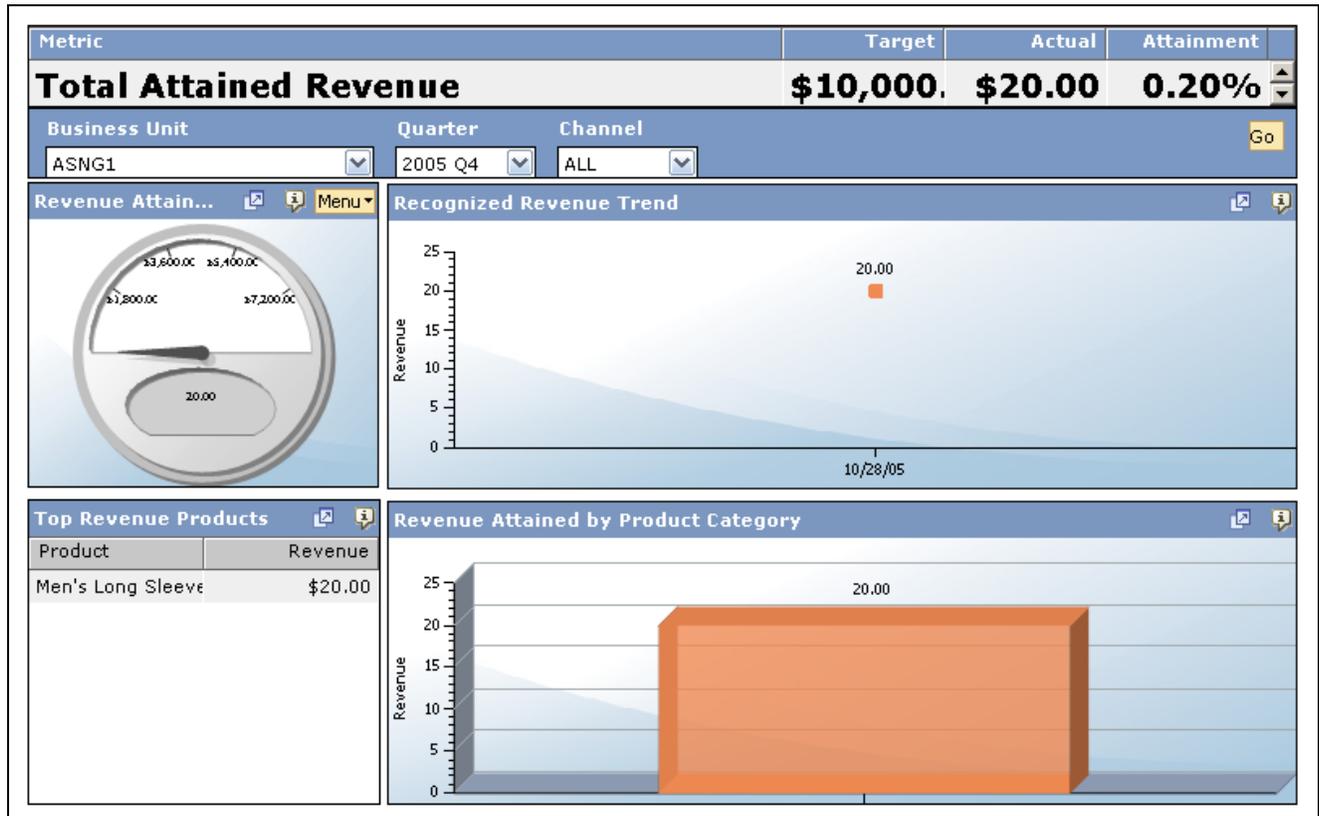
This view displays the revenue amount of orders represented by the different hold categories. Since orders may have more than one hold, the same order may be counted more than once. All global filters affect this view.

In-Process Orders

This view displays the business project step and the revenue amount of the orders currently in that step. All global filters affect this view.

Using the Total Attained Revenue Discovery Report Page

Access the Total Attained Revenue discovery report page.



Total Attained Revenue discovery report page

Revenue Attainment

This view shows the revenue attainment to date in the quarter as compared to the quarterly target.

Recognized Revenue Trend

This view shows the trend of revenue over the current quarter.

Top Revenue Products

This view shows the top revenue products for the total revenue earned by product over the current quarter.

Revenue Attained by Product Category

This view shows the total revenue amount each category has achieved over the last quarter. The X axis represents the product category and the Y axis represents the attained revenue.

Using the Order Throughput Discovery Dashboard Pages

This section discusses how to:

- Use the New Orders discovery report page.

- Use the In Process Orders discovery report page.
- Use the Completed Orders discovery report page.

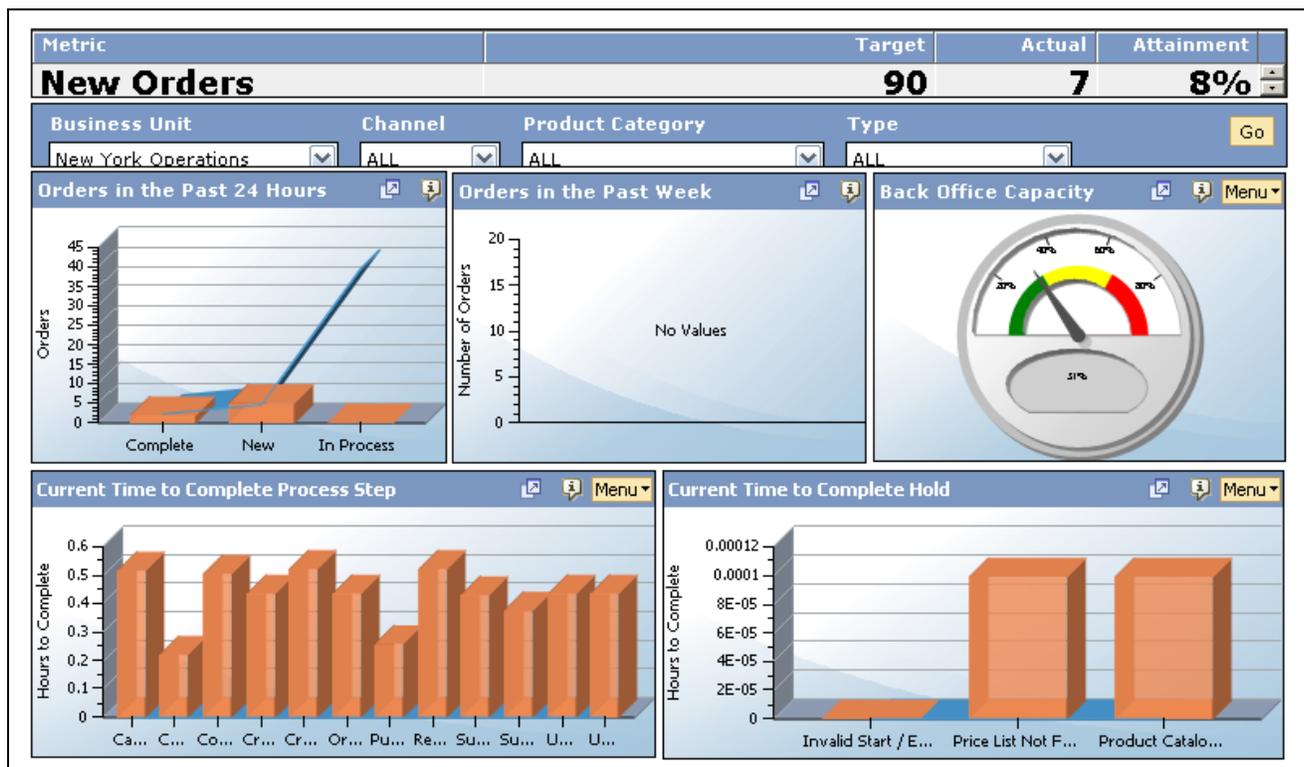
Pages Used to View the Order Capture Throughput Discovery Reports

Page Name	Object Name	Navigation	Usage
New Orders	Discovery - Throughput - New Orders	Click the New Orders link in the Throughput section on the Order Capture Summary page.	Measure the number of orders submitted in the past 24 hours, including the daily average over the last week. You can also view the number of orders submitted in the last week by date and the number of open orders against a predetermined capacity that shows the days until delivery, and the percent of orders to be delivered. Additionally, you can see the number of new orders that are in business processes and the number of new orders that are on hold.
In Process Orders	Discovery - Throughput - Incomplete Orders	Click the In Process Orders link in the Throughput section on the Order Capture Summary page.	Measure the number of orders in process in the past 24 hours. You can also view the number of actual orders in process in the past 24 hours and the daily average over the last week. This discovery page also measures orders in process in the last week, by date, number of open orders against a predetermined capacity, and the number of new orders that are in the process of being completed. Additionally, you can view the number of new orders that are on hold. Note. Orders are either in an <i>in process</i> or <i>complete</i> status. New orders are orders that have been entered into the system in the past 24 hours. An order can be in a <i>new</i> status and also be in an <i>in process</i> or <i>complete</i> status.

Page Name	Object Name	Navigation	Usage
Completed Orders	Discovery - Throughput - Completed Orders	Click the Completed Orders link in the Throughput section on the Order Capture Summary page.	Measure the number of orders that have come in over the past 24 hours, the number of orders that have been processed in the last week, the number of open orders that have been processed against a predetermined capacity, the number of new orders that are in the process of being completed, and the number of new orders that are on hold.

Using the New Orders Discovery Report Page

Access the New Orders discovery report page.



New Orders discovery report page

Orders in the Past 24 Hours

This view measures the number of orders in the past 24 hours. The X axis separates the orders by status (in process or complete) and the Y axis represents the number of orders. The bars measures the actual orders in the past 24 hours and the line measures the daily average over the last week.

Orders in the Past Week

This view measures orders processed in the last week. The Y axis measures the number of orders. The X axis groups the orders by date. The report filters data to display completed orders on the orange line, new orders on the light blue line, and in process orders on the dark blue line.

Back Office Capacity

Displays the number of new orders against a predetermined capacity.

Current Time to Complete Process Step

This view measures the number of new orders that are in business processes. The X axis groups the report by process. The block graph shows the average time to completion for tasks that have completed in the last day. The line graph shows the average time to completion for tasks that have completed in the past week.

Current Time to Complete Hold

This view measures the number of new orders that are on hold. The X axis groups the report by hold. The block graph shows the average time to completion for holds that have completed in the past day. The line graph shows the average time to completion for holds that have completed in the past week.

Using the In Process Orders Discovery Report Page

Access the In Process Orders discovery report page.



In Process Orders discovery report page

Orders in the Past 24 Hours

This view measures orders in the past 24 hours. The X axis separates the orders by status (in process or complete) and the Y axis represents the number of orders. The bars measure the actual orders in the past 24 hours and the line measures the daily average over the last week.

Orders in the Past Week

This view measures orders processed in the last week. The Y axis measures the number of orders. The X axis groups the orders by date. The view filters data to display completed orders on the orange line, new orders on the light blue line, and the in process orders on the dark blue line.

Back Office Capacity

Displays the number of in process orders against a predetermined capacity.

Current Time to Complete Process Step

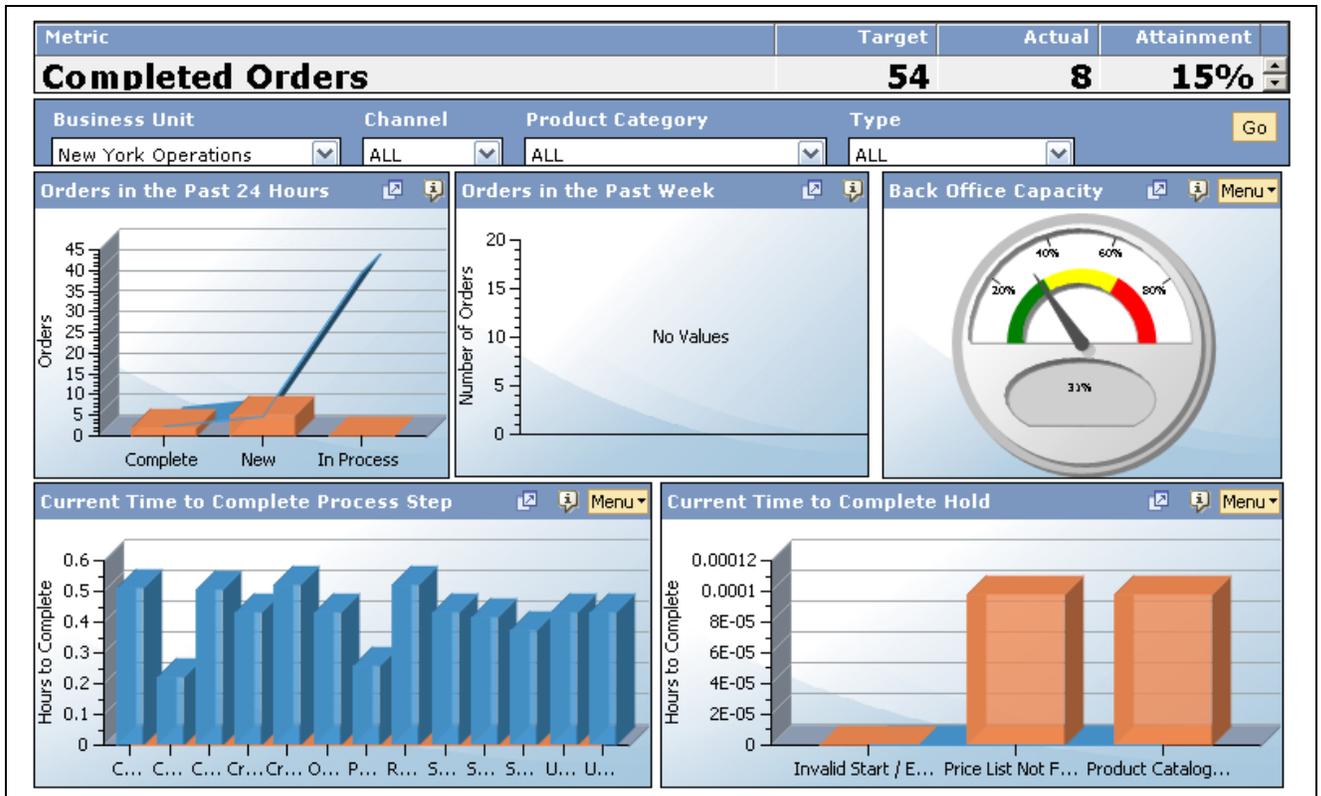
This view measures the number of orders that are in business processes. The X axis groups the report by process and the Y axis groups by the average time the orders have been in the process. The block graph shows the average time of the orders currently in process and the line graph shows the average process time over the past week.

Current Time to Complete Hold

This view measures the number of orders that are on hold. The X axis groups the report by hold category and the Y axis groups by the average time the orders have been on hold. The block graph shows the average time of the orders currently on hold and the line graph shows the average process time over the past week.

Using the Completed Orders Dashboard

Access the Completed Orders discovery report page.



Completed Orders discovery report page

Orders in the Past 24 Hours

This view measures orders in the past 24 hours. The X axis separates the orders by status (in process or complete) and the Y axis represents the number of orders. The bars measure the actual orders in the past 24 hours and the line measures the daily average over the last week.

Orders in the Past Week

This view measures all orders in the last week. The Y axis measures the number of orders. The X axis groups the orders by date. This view filters data to display completed orders on the orange line, new orders on the light blue line, and in process orders on the dark blue line.

Back Office Capacity

This view displays the number of completed orders against a predetermined capacity.

Current Time to Complete Process Step

This view measures the number of orders that are in business processes. The X axis groups the report by process and the Y Axis groups by the average time the orders have been in the process. The block graph shows the average time of the orders currently in process and the line graph shows the average process time over the past week.

Current Time to Complete Hold

This view measures the number of orders that are on hold. The X axis groups the report by hold category and the Y axis groups the average time the orders have been on hold. The block graph shows the average time of the orders currently on hold and the line graph shows the average process time over the past week.

Executing Actions from the Order Capture Dashboards

This section discusses how to:

- Cancel orders.
- Change delivery methods.
- Change requested arrival dates.
- Override business project steps.
- Override holds.
- Send mail.
- Substitute products.

Note. The system does not pass parameters when you select an action from the Menu drop-down list. If you right-click a graph area and select an action, the system passes the parameters to the action page. If you select an action from the Menu drop-down list, the system uses the default parameters for the action and page.

Also, PeopleSoft CRM recommends that if you are going to perform multiple actions on an order, drill into the order and perform the actions in the PeopleSoft Order Capture application, instead of doing them through the BAM action interfaces.

Pages Used to Execute Actions from the Order Capture Dashboards

Page Name	Object Name	Navigation	Usage
Cancel Order	Action - Cancel Order	Select the Action - Cancel Order link from the Menu drop-down list on the discovery page.	Cancel one or more orders.
Change Delivery Method	Action - Change Delivery Method	Select the Action - Change Delivery Method link from the Menu drop-down list on the discovery page.	Change the delivery method for selected orders.
Change Requested Arrival Date	Action - Change Requested Arrival Date	Select the Action - Change Requested Arrival Date link from the Menu drop-down list on the discovery page.	Change the requested arrival date for selected orders.
Override Business Project Step	Action - Override Business Project Step	Select the Action - Override Business Project Step link from the Menu drop-down list on the discovery page.	Override a single business project step for selected orders.
Override Holds	Action - Override Holds	Select the Action - Override Holds link from the Menu drop-down list on the discovery page.	Override holds for selected orders.
Send Mail	Action - Send Mail	Select the Action - Send Mail link from the Menu drop-down list on the discovery page.	Send email to customers regarding selected orders. You can sort orders by business unit, order capture ID, customer, header status, and email address. In the email section you can select a specific template to use.
Substitute Products	Action - Substitute Products	Select the Action - Substitute Products link from the Menu drop-down list on the discovery page.	Substitute products for selected order lines.

Canceling Orders

Access the Cancel Order action page.

Cancel Order			
Step 1 : Select Orders			
<input type="checkbox"/>	Order Capture ID	Customer	Header Status
<input type="checkbox"/>	COM0500002	Ted Pepper	Submitted
<input type="checkbox"/>	COM0500003	Anne Walker	Submitted
<input type="checkbox"/>	COM0500004	Tony DeMarco	Submitted
<input type="checkbox"/>	COM0500005	Anne Walker	Submitted
<input type="checkbox"/>	COM0500006	Anne Walker	Submitted
<input type="checkbox"/>	COM0500022	Softgear Inc.	Submitted
<input type="checkbox"/>	COM0500024	B&F Enterprises	Submitted
<input type="checkbox"/>	COM0500025	B&F Enterprises	Submitted
<input type="checkbox"/>	COM0500029	Ted Pepper	Submitted
<input type="button" value="Cancel Order"/>			
Step 2 : Review Results			
Order Capture ID	Customer		
SO0023	Cresto Incorporated		

Cancel Order action page

To cancel an order:

1. Select the orders that you want to cancel.
2. Click Cancel Order.
3. Review the results in the Review Results section.

Changing Delivery Methods

Access the Change Delivery Method action page.

Change Delivery Method							
Step 1 : Select Orders To Update							
<input type="checkbox"/>	Order Capture ID	Line	Customer	Scheduled Shippi	Carrier	Total One Time P	Currency Code
<input type="checkbox"/>	COM0500002	1	Ted Pepper		None	10.00	USD
<input type="checkbox"/>	COM0500003	1	Anne Walker		None	13.50	USD
<input type="checkbox"/>	COM0500003	2	Anne Walker		None	0.00	USD
<input checked="" type="checkbox"/>	COM0500003	5	Anne Walker		None	1.30	USD
<input type="checkbox"/>	COM0500003	4	Anne Walker		None	1.20	USD
<input type="checkbox"/>	COM0500003	3	Anne Walker		None	11.00	USD
Step 2 : Select Carrier							
Carrier							
<input type="radio"/> UPS 2nd Day Air							
<input checked="" type="radio"/> UPS Ground							
<input type="radio"/> UPS Next Day Air							
<input type="button" value="Submit"/>							
Step 3: Review Results							
Order Capture ID	Customer	Line	Original Carrier	New Carrier			
COM0500003	Anne Walker	5	None	UPS Ground			

Change Delivery Method action page

To change the delivery method of an order:

1. Select the orders for which you want to change delivery methods.
2. Select the new delivery method.
3. Click Submit.
4. Review the results in the Review Results section.

Changing Requested Arrival Dates

Access the Change Requested Arrival Date action page.

Change Requested Arrival Date				
Step 1 : Select Orders				
<input type="checkbox"/>	Order Capture ID	Customer	Requested Arrival Date	Carrier
<input type="checkbox"/>	SO0018	Alliance Group	11/8/2002 12:00:00 AM	UPS Ground
<input type="checkbox"/>	CRO0307200	Apex Systems		None
<input type="checkbox"/>	CRO0307199	Apex Systems		None
<input type="checkbox"/>	CRO0307198	Apex Systems		None
<input type="checkbox"/>	CRO0307197	Apex Systems		None
<input checked="" type="checkbox"/>	CRO0307196	Apex Systems		None
<input type="checkbox"/>	CRO0307195	Apex Systems		None
<input type="checkbox"/>	CRO0307173	Apex Systems		None
Step 2 : Select Date				
Date	7/29/2005 10:00:00 AM			
<input type="button" value="Submit"/>				
Step 3 : Review Results				
Order Capture ID	Customer	Original Requested Arrival Date	New Requested Arrival Date	
CRO0307196	Apex Systems		7/29/2005 10:00:00 AM	

Change Requested Arrival Date action page

To change the requested arrival date of an order:

1. Select the orders for which you want to change the requested arrival date.
2. Enter the new arrival date and time.
3. Click Submit.
4. Review the results in the Review Results section.

Overriding Business Project Steps

Access the Override Business Project Step action page.

Override Business Project Step				
Step 1 : Select Orders				
<input type="checkbox"/>	Order Capture ID	Customer	Task	Region
<input type="checkbox"/>	COM0500006	Anne Walker	Check if account exists	
<input type="checkbox"/>	COM0500005	Anne Walker	Create installed Product	
<input type="checkbox"/>	COM0500003	Anne Walker	Create installed Product	
<input type="checkbox"/>	COM0500022	Softgear Inc.	Check if account exists	
<input type="checkbox"/>	COM0500038	Softgear Inc.	TELCO_NS_PRODBP	
<input type="checkbox"/>	COM0500041	Softgear Inc.	TELCO_NS_PRODBP	
<input checked="" type="checkbox"/>	COM0500048	Softgear Inc.	TELCO_NS_PRODBP	
<input type="checkbox"/>	COM0500046	Softgear Inc.	TELCO_NS_PRODBP	
<input type="checkbox"/>	COM0500045	Softgear Inc.	TELCO_NS_PRODBP	
<input type="button" value="Override Step"/>				
Step 2 : Review Results				
Order Capture ID	Customer	Task		
COM0500048	Softgear Inc.	TELCO_NS_PRODBP		

Override Business Project Step action page

To override a business project step:

1. Select the orders for which you want to override the business project step.
2. Click Override Step.
3. Review the results in the Review Results section.

Overriding Holds

Access the Override Holds action page.

Override Holds				
Step 1 : Select Orders				
<input type="checkbox"/>	Order Capture ID	Customer	Hold Code	Hold Status
<input type="checkbox"/>	CRO0307078	Apex Systems	Fulfill By date is before Earliest	Requires Action
<input type="checkbox"/>	CRO0307077	Apex Systems	Fulfill By date is before Earliest	Requires Action
<input type="checkbox"/>	CRO0307076	Apex Systems	Fulfill By date is before Earliest	Requires Action
<input type="checkbox"/>	CRO0307175	Apex Systems	Fulfill By date is before Earliest	Requires Action
<input type="checkbox"/>	CRO0307187	Advanced Consulting	Product Catalog Violation	Requires Action
<input type="checkbox"/>	CRO0307182	Advanced Consulting	Product Catalog Violation	Requires Action
<input type="checkbox"/>	CRO0307147	Advanced Consulting	Product Catalog Violation	Requires Action
<input type="checkbox"/>	CRO0307147	Advanced Consulting	Product Catalog Violation	Requires Action
<input checked="" type="checkbox"/>	CRO0307147	Advanced Consulting	Product Catalog Violation	Requires Action
<input type="checkbox"/>	CRO0307188	Adventure 54	Credit Card Hold	Requires Action

Override Hold

Step 2 : Review Results		
Order Capture ID	Customer	Hold Code
CRO0307147	Advanced Consulting	Product Catalog Violation

Override Holds action page

To override a hold for an order:

1. Select the orders for which you want to override a hold.
2. Click Override Hold.
3. Review the results in the Review Results section.

Sending Mail

Access the Send Mail action page.

Send Mail

Step 1: Select Order to Send Email Business Unit: Appliances Header Status: ALL Filter

Business Unit	Order Capture ID	Customer	Header Status	Email Address
Appliances	OC00637	Shoreview Medical	Submitted	jpepper@pepperhousehold
Appliances	SO0014	Shoreview Medical	Submitted	jpepper@pepperhousehold
Appliances	SO0033	Shoreview Medical	Submitted	jpepper@pepperhousehold
Appliances	SO006	Shoreview Medical	Submitted	jpepper@pepperhousehold
Appliances	OC00644	Shoreview Medical	Submitted	jpepper@pepperhousehold

Email Recipients

To: jpepper@pepperhousehold_psft.com

CC:

BCC: (Enter other recipient email addresses.)

Template: RSF:Notify Reps to Engage

Subject: Shoreview Medical

Message: Dear Jack Pepper,
Please contact this customer regarding a new opportunity. They have requested a sales call within the next two weeks.

Step 3: Confirmations

Recipient	Business Unit	Capture ID	Status	Email Address
RHarrison@yahoo.com	US300			RHarrison@yahoo.com
jpepper@pepperhousehold	SUPDB			jpepper@pepperhousehold
Burt Lee				

Send Mail action page

To send email to a customer regarding an order:

1. Click the email address of the person for whom you want to send an email.
2. Compose the email using the fields in the Compose Email section.
3. Click Send.
4. Review the results in the Confirmations section.

Substituting Products

Access the Substitute Products action page.

Substitute Products

Product Filter

Step 1 : Select Order Lines

<input type="checkbox"/>	Order Capture ID	Customer	Line	Product	Calculated Order Re	Quantity Ordered
<input checked="" type="checkbox"/>	CRD219	Advanced Consulting	1	Men's Long Sleeve Bi	200.00	1.00

Step 2 : Select Alternate Product

Alternate Product
<input type="radio"/> Long Sleeve T-Shirt, Men's
<input checked="" type="radio"/> Long Sleeve T-Shirt, Women's
<input type="radio"/> Gamma3 Mountain Tent

Step 3 : Review Results

Order Capture ID	Line	Product	Alternate Product
CRD219	1	Men's Long Sleeve Bike Jersey	Long Sleeve T-Shirt, Women's

Substitute Products action page

Note. The Order Capture Dashboard application follows the same maintenance restrictions that are followed in PeopleSoft CRM Order Capture. For example, at a given time in the order life cycle, if you do not allow a user to substitute products in PeopleSoft CRM Order Capture, the system will not allow the user to substitute products when they are using the Order Capture Dashboard application. This restriction is often enforced to prevent users from substituting a product for another after the product has already shipped.

To substitute product information for an order:

1. Select the orders lines for which you want to substitute a product.
2. Select an alternative product.
3. Click Submit.
4. Review the results in the Review Results section.

Using the Failed Actions Pages

If an action fails an email is sent to the user who submitted the action with a link to the transactions that failed.

PeopleSoft delivers a group of pages that contain information regarding actions that have failed to process. Each action has its own page that you can access to see what orders have failed. You can then select an order and choose to resubmit it.

These actions include:

- Cancel Order
- Change Delivery Method
- Change Requested Arrival Date.
- Override Business Project Step.
- Override Holds.
- Substitute Products.

Pages Used to View and Re-Submit Failed Action Information

Page Name	Object Name	Navigation	Usage
List of Failed Actions	Action - Cancel Order - Failed, Action - Change Delivery Method - Failed, Action - Change Requested Arrival Date - Failed, Action - Override Business Project Step - Failed, Action - Override Holds - Failed, Action - Substitute Products - Failed	<ul style="list-style-type: none"> • Select the Action - Cancel Order - Failed link from the Menu drop-down list on the discovery page. • Select the Action - Change Delivery Method - Failed link from the Menu drop-down list on the discovery page. • Select the Action - Change Requested Arrival Date - Failed link from the Menu drop-down list on the discovery page. • Select the Action - Override Business Project Step - Failed link from the Menu drop-down list on the discovery page. • Select the Action - Override Holds - Failed link from the Menu drop-down list on the discovery page. • Select the Action - Substitute Products - Failed link from the Menu drop-down list on the discovery page. 	View and resubmit information regarding these actions: cancel order, change delivery method, change requested arrival date, override business project step, override holds, and substitute products.

Using and Resubmitting Failed Actions

Access one of the List of Failed Action page.

CHAPTER 7

Using the PeopleSoft Enterprise Contact Center Dashboards

This chapter provides overviews of Contact Center Dashboards as well as red, yellow, and green cases, and red, yellow, and green emails, and discusses how to:

- Set up the percentages of SLA for red and yellow cases.
- Set up service, email, and interaction targets.
- Use the summary pages to access discovery reports for PeopleSoft Contact Center.
- Use the Operations discovery dashboard pages.
- Use the Time to Red discovery dashboard pages.
- Use the Resolution Management discovery dashboard pages.
- Use the Other discovery report pages.
- Execute actions from the Contact Center Dashboards.

Note. There are three applications included in the Contact Center Dashboard solution: PeopleSoft Enterprise Service Dashboard (the underlying application for this dashboard is PeopleSoft Support), PeopleSoft Enterprise HelpDesk Dashboard, and PeopleSoft Enterprise HelpDesk for Human Resources Dashboard. All three dashboards contain information regarding cases, emails, and interactions. There are also two delivered alerts: Red Case Alert and Case Backlog Alert.

Understanding Contact Center Dashboards

This section discusses:

- Actions.
- Targets and alerts.
- Security.

Actions

You select actions from the Menu drop-down list on the discovery report pages. The system transfers the data from the report or view that you came from into the action page. Using the fields at the top of the page you can then use additional filters to display data.

To transfer all the data in the view to the action, drill across to actions using the items in the Menu drop-down list. To transfer only the data from that bar to the action, right click on a specific bar and then choose an action. In addition, you can drill down to a list and choose specific data from the list to send only those items to the action page.

On the action pages, you can select multiple cases, emails, and interactions and perform an action, then select others and perform different actions. As long as you don't close the page, you can view all the cases, emails, and interactions you have taken action on in the review section. Once you close the page, you cannot review the status of those cases, emails, and interactions anymore.

This table lists the actions that are delivered as part of the service dashboard solution:

- Add case note
- Email assigned agent
- Email assigned agent manager
- Email contact center manager
- Email customer contact
- Escalate cases
- Email employee *
- Reassign cases
- Reassign email
- Update priority
- Update status
- Relate cases
- Add a task

* Used for HelpDesk and HelpDesk for Human Resources applications only.

Note. Not all actions are available with all views.

Targets and Alerts

This section discusses:

- Alerts.
- Targets for Service (Support), HelpDesk, and HR HelpDesk.
- Targets for email and interactions.

Alerts

Alerts are messages that the dashboard system sends to specific users when predefined conditions are met. The dashboard interface includes an alerts report and an alerts view on each summary report page. Alerts do not necessarily demand action; they notify the user of a situation. It is then up to the user to respond appropriately.

This table describes the alerts and any calculation needed to determine the alert:

Alert	Calculation	Alert Detail	Drill Down
Red Case Alert If number of red cases is over 5	Number of Red Cases > 5	There are X Red Cases for business unit XYZ.	Drill to Red Discovery dashboard
Case Backlog Alert If case backlog is over 100	Backlog > 100	Case Backlog is X for business Unit XYZ	Drill to Backlog dashboard

Note. You can set up whatever alerts you need to effectively run your business operation. Alerts can be used to run the deletion and summary plans. PeopleSoft delivers these alerts as disabled. Use Oracle BAM Architect to turn on alerts and schedule them at the desired intervals. Information on setting up actions and alerts, navigation links, drill-down, and using page controls is explained in separate documentation.

See *Oracle BAM Architect User's Guide*

See *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook*, "Understanding PeopleSoft Dashboards".

Targets for Service (Support), HelpDesk, and HR HelpDesk

Targets and thresholds are integrated into the reports to help users readily identify business risks. To support discovery reports and metrics, you need to set up various targets or values in the system. These targets and values are defined by business unit.

This table summarizes the targets you can set for PeopleSoft Service (Support), HelpDesk, and HR HelpDesk:

Target	Use	Type
% Red Cases	Summary and Discovery page metric	Percentage
% Yellow Cases	Summary and Discovery page metric	Percentage
Average Time to Close (Days)	Summary and Discovery page metric	Time - Hours
First Call Resolution Rate	Summary and Discovery page metric	Percentage
Total Case Backlog	Summary and Discovery page metric	Number
Minimum Time to Close (Days) for High Throughput	Measure calculation	Number
Minimum Time to Close (Days) for Medium Throughput	Measure calculation	Number

Targets for Email and Interactions

This table summarizes the requirements for email and interactions:

Target	Use	Comments	Fact	Type
% Red Email	Summary and Discovery Page Metric	Time to Red	Email	Percentage
% Yellow Email	Summary and Discovery Page Metric	Time to Red	Email	Percentage
Email Response Time (minutes)	Summary and Discovery Page Metric	Operations	Email	Time - minutes
Call Volume Per Hour	Summary and Discovery Page Metric	Operations	Interaction	Number
Total Email Backlog	Summary and Discovery Page Metric	Operations	Email	Number
Email Closed in the last day	Summary Page Metric	Resolution Management	Email	Number
Hours to Due Date, Red - Email	Measure Calculation	Red Email	Email	Time - Hours
Hours to Due Date, Yellow - Email	Measure Calculation	Yellow Email	Email	Time - Hours

Security

The system enforces business unit and setID security. Where customers implement PeopleSoft row-level security for business units and setIDs, the information is automatically passed from the PeopleSoft CRM database to the dashboard.

Note. PeopleSoft delivers the security filters, but it is up to you to apply the filters if you are using business unit security. The implementation of security between your CRM applications and your dashboard applications does not occur automatically.

See *PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook*, “Understanding Security Integration”.

Secure Cases

Within the Case components, a case can be specified as *secured*. When a case is *secured*, only agents in the provider group assigned to the case can view the details. Other agents can see that the case exists, but they cannot open the case.

If a case is secured, the system does not bring in the summary into the dashboard. Instead, you will see the word *Secured*. You can still drill into the case from the dashboard. However, if you don't have access to view the case, you will get an error message from the CRM database. You can also take actions on secured cases from the dashboard. Once that action gets to the CRM database, the Case component determines if the user has the proper access and returns an error message if they are not allowed.

The Problem Summary is shown as *Secured* and there is no link to drill into this case. The agent, however, can see other information about the case, such as its status and who is the assigned agent.

Note. The dashboard application displays *Secured* for secured cases no matter who is looking at the case.

Understanding the Use of Red, Yellow, and Green Cases in Discovery Reports

The system determines whether the status of a case is red, yellow, or green based on the required restore time the customer is entitled to on their service level agreement (SLA) and the red and yellow targets that are set at implementation.

The time that a case is on hold and the time the business is closed do not count against the SLA time. So that this calculation can be used outside of dashboards, it is calculated in the CRM database and sent to the Active Data Cache (ADC).

These fields are included in the RC_CASE record:

- Red Restore (RC_RED_DTTM)
- Yellow Restore (RC_YELLOW_DTTM)

These fields capture the date and time the case turns red and yellow. They are also used, along with other SLA fields, to calculate SLA processing. These fields are also included in the Case Component Interface (CI). It is viewable through the Case Enterprise Integration Point (EIP).

The Red Restore and Yellow Restore fields are defined as terms in the PeopleSoft Active Analytics Framework (AAF). They are not enabled on any display templates that are delivered with the application. The red and yellow dates and times are calculated by adding the response time to the SLA start date and time.

Understanding the Use of Red and Yellow Emails in Discovery Reports

The status of an email (red, yellow or green) is calculated based on how close an email is to its due date. The Red Date and Time and Yellow Date and Time fields are calculated in the ETL (extract, transform, load) plan using the targets set in ADC (active data cache). The targets used to compute the red and yellow dates and times are Hours to Due Date, Red - Email and Hours to Due Date, Yellow - Email.

Here is how the system computes red and yellow email:

- Red Email Computation:

If the current date is greater than the red date and time and the email is not closed, then the system marks the email as red. If the closed date and time is greater than the red date and time, then the system marks the email as red.

- Yellow Email Computation:

For open email, if the current date and time is greater than the yellow date and time and less than the red date and time, then the system marks the email as yellow. For closed email, if the closed date and time is greater than the yellow date and time and less than the red date and time, then the system marks the email as yellow.

You set up target values on the Setup - Service Targets, Setup - HelpDesk Targets, and Setup - HR HelpDesk Targets pages to indicate the percentage of emails that are late before it turns an email red or yellow. Using these pages, you can indicate the percent of red email, percent of yellow email, email closed in the last day, email response time (minutes), hours to due date - red email, hours to due date - yellow email, and total email backlog.

The system uses the numbers and percentages that you enter to calculate and display information on the discovery dashboard pages.

Setting Up the Percentages of SLA for Red and Yellow Cases

This section discusses how to set up the SLA percentages for red and yellow cases.

Page Used to Set Up the SLA Percentages for Red and Yellow Cases

Page Name	Object Name	Navigation	Usage
Call Center Definition - Options	BUS_UNIT_RC2	Set Up CRM, Business Unit Related, Call Center Definition, Options	Enter the SLA percent numbers that will turn cases red and yellow in the PeopleSoft Services Dashboard application for the specified business unit.

Setting Up SLA Percentages for Red and Yellow Cases

Access the Call Center Definition - Options page.

Call Center BU		Options	Case Defaults
Business Unit US200		CRMCO APPLIANCES	
Agent			
Enable	Feature	Option	Notes
<input checked="" type="checkbox"/>	Assign Person	Available	Automatically assign the case when it is saved
<input checked="" type="checkbox"/>	Assign Provider Group	Available	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 Response EIP	5	Limit the number of notes in the EIP 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 Verity Search		Executes the Verity 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
<input checked="" type="checkbox"/>	Percent of SLA for Red	90	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

Call Center Definition - Options page

Note. When you initially enter or update these values, the system calculates the red date and time (RC_RED_DTTM) and yellow date and time (RC_YELLOW_DTTM) fields correctly only for new cases or existing cases that are updated. Run the Red and Yellow Cases (RC_REDYELLOW) Application Engine program after you set these values. This program will update all existing cases with the appropriate dates and times for red and yellow cases.

Percent of SLA for Red

Enter the percentage of restore time that you want the system to use that will turn a case red when it is compared to the start date and time and the customer’s entitled restore time on their service level agreement.

For example, if a customer is entitled to have their cable service restored within 4 hours after they call in a problem and the percent of SLA for red is 90, the case would turn red after the technician has spent 3 hours and 36 minutes at the site (240 minutes x .90 = 216 minutes or 3 hours and 36 minutes).

Percent of SLA for Yellow

Enter the percentage of restore time that you want the system to use that will turn a case yellow when it is compared to the start date and time and the customer’s entitled restore time on their service level agreement.

Setting Up Service, Email, and Interaction Targets

This section discusses how to set up service, email, and interaction targets:

Note. The targets and thresholds that you set up using these pages are applicable to the PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources applications.

Page Used to Set Up Service, Email, and Interaction Targets

Page Name	Object Name	Navigation	Usage
Setup - Service Targets	Setup - Service Targets	<ul style="list-style-type: none"> Click My Dashboards, Service Targets Click My Dashboards, Helpdesk Targets Click My Dashboards, HR Helpdesk Targets 	<p>Establish the targets and thresholds that you want the system to use when calculating information to display on the various dashboards for PeopleSoft Call Center applications. Establish these targets and thresholds by business unit. This setup page includes fields for red cases, yellow cases, close days, backlog thresholds, customer and employee satisfaction, escalation, red email, yellow email, email response time, call volume, email backlog, closed email, and hours to due date for red and yellow email.</p>

Setting Up Service, and HelpDesk Targets

Access the Setup - Service Targets page.

Setup - Service Targets

Note. The page shown here is for setting up Service targets. The setup target pages for HelpDesk and HR Helpdesk are similar to the one used for Service targets.

Use the fields on this page to set up the targets and thresholds that you want the system to use to display dashboard information about the cases, emails, and interactions that your call centers are managing.

You can set up different targets and thresholds for the various business units that you are using in your applications. The system uses the numbers that you enter to calculate and display information on the dashboards. If the target is a summary page metric, you will see that target on the summary page.

You can use this information to monitor case loads and the efficiency with which your contact center responds to customers through email and other interactions (phone calls and chat).

Insert To insert a row into the grid, select a row and then click Insert. The system adds a new row at the end of the grid with the same values as the row you selected except for business unit, which is blank.

Delete To delete a row, select the corresponding check box and then click Delete.

Save To save your entries, click Save.

See Chapter 7, “Using the PeopleSoft Enterprise Contact Center Dashboards,” Understanding Contact Center Dashboards, page 117.

Using the Summary Pages to Access Discovery Reports for PeopleSoft Call Center

This section discusses how to:

- Use the summary page to access discovery reports for PeopleSoft Support.
- Use the summary page to access discovery reports for PeopleSoft HelpDesk.
- Use the summary page to access discovery reports for PeopleSoft the HelpDesk for Human Resources.

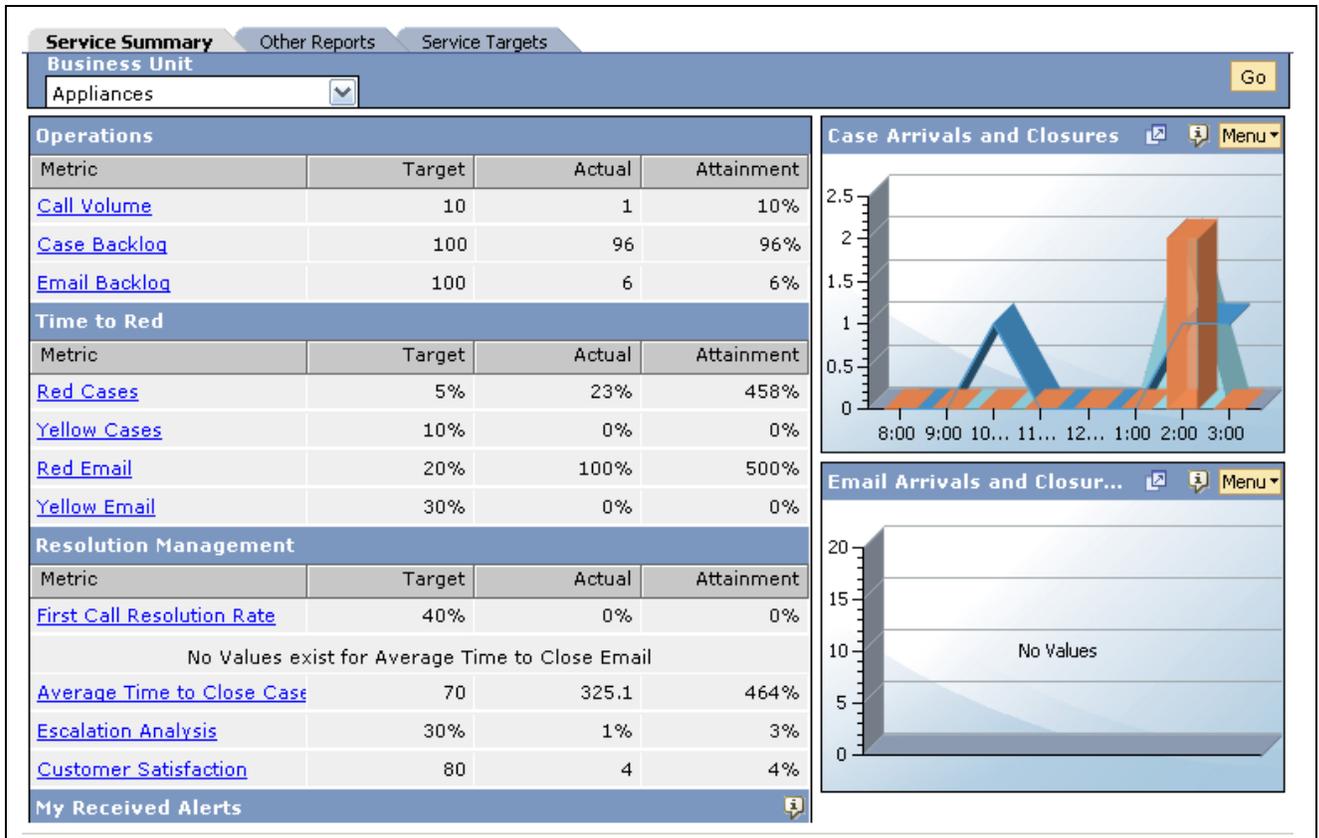
Note. You can also access action pages from the charts displayed on the Summary pages.

Pages Used to Access Discovery Reports for the Service Dashboards

Page Name	Object Name	Navigation	Usage
Service Summary	Summary - Service Summary	Click My Dashboard, Service Summary.	View real-time information about to the operation of the PeopleSoft CRM Service (Support) application.
HelpDesk Summary	Summary - HelpDesk Summary	Click My Dashboards, HelpDesk Summary.	View real-time information about the operation of the PeopleSoft CRM HelpDesk application.
HR HelpDesk Summary	Summary - HR HelpDesk Summary	Click My Dashboards, HR HelpDesk Summary.	View real-time information about the operation of the PeopleSoft CRM HelpDesk for Human Resources application.

Using the Summary Page to Access Discovery Reports for PeopleSoft Support

Access the Service Summary page.



Service Summary page

The page is rendered using your default business unit. You can change the business unit to view data from a different business unit. To change the business unit, select the business unit and click Go. It is important to note that you are only viewing data from one business unit at a time on this page.

Also, the left hand side of the page contains the key metrics for your call center. These metrics are divided into three themes: Operations, Time to Red, and Resolution Management.

For each metric, a target value is shown, followed by the actual value and the attainment value (actual value divided by target value). Here are explanations for each value:

- Target values

These values come from a Target Setup table in the system. The target value is keyed on business unit and displayed in the Target field.

- Actual values

These values are obtained from getting a total count of what you are measuring (for example, the count of case IDs based on only showing those cases that are open and on-hold for a specific business unit).

- Attainment values

These values are obtained by calculating the actual field divided by the target field. Attainment is always shown as a percentage of the whole and can equal greater than 100%. The meaning of the percent attainment differs depending on the metric that it is evaluating. In some instances if the percent attainment is low, it is a positive (for example, if the First Call Resolution metric a low percentage is good). In other instances a low attainment percentage is a negative. Users will need to know the scale of each metric and what the percent attainment means to understand its impact. In summary the attainment tells the user the percentage of the target or goal that has been reached.

Each key metric contains links. When you click a link, the corresponding discovery page opens.

Here are descriptions of the sections that appear on the page:

Operations

This section displays operational information about call volume, case backlogs, and email backlogs.

Time to Red

This section shows the percentage of cases that are in a red status and a yellow status. In addition, you can see the percentage of emails that are in red or yellow status.

Resolution Management

This section displays the percentage of cases that were resolved on the first call as well as the average time it is taking to close cases and emails, cases that have been escalated, and cases that have customer satisfaction ratings.

My Received Alerts

This section enables you to view and delete your alerts. It shows the task, description, and the date and time the alert was received. Here is an explanation of the information that may appear in this section:

- Case backlog counts open and on-hold cases, not closed or canceled cases.
- Call Volume counts interactions received in the previous hour.
- Email Backlog counts inbound email and emails that are in these statuses: *Assign*, *New*, *In Progress*, and *Reassign*.
- Red Cases counts red cases that are open and on-hold.
- Yellow Cases counts yellow cases that are open and on-hold.
- Red Email counts inbound red email that are that are in these statuses: *Assigned*, *New*, *In Progress*, or *Reassigned*.
- Yellow Email counts inbound yellow email that are in these statuses: *Assigned*, *New*, *In Progress*, or *Reassigned*.
- First Call Resolution Rate counts cases that have been closed by first contact in the last 7 days.
- Average Time to Close Email counts the average time to close cases in the last 24 hours.
- Average Time to Close Cases counts the average time to close cases in the last 7 days.

Case Arrivals and Closures

This view measures case arrivals and case closures within the last 8 hours. The Y axis measures the number of cases. The X axis groups the report by the last 8 hours.

The report filters data to display all cases created in the last 8 hours. The three dimensional red bar represents the number of cases that have been created in the last 8 hours. The three dimensional blue line represents the number of cases that have been created the day before. The light blue three dimensional area represents the number of cases that have been closed in the last 8 hours.

From this view you can drill to the Discovery - Case Arrivals report and access various action pages.

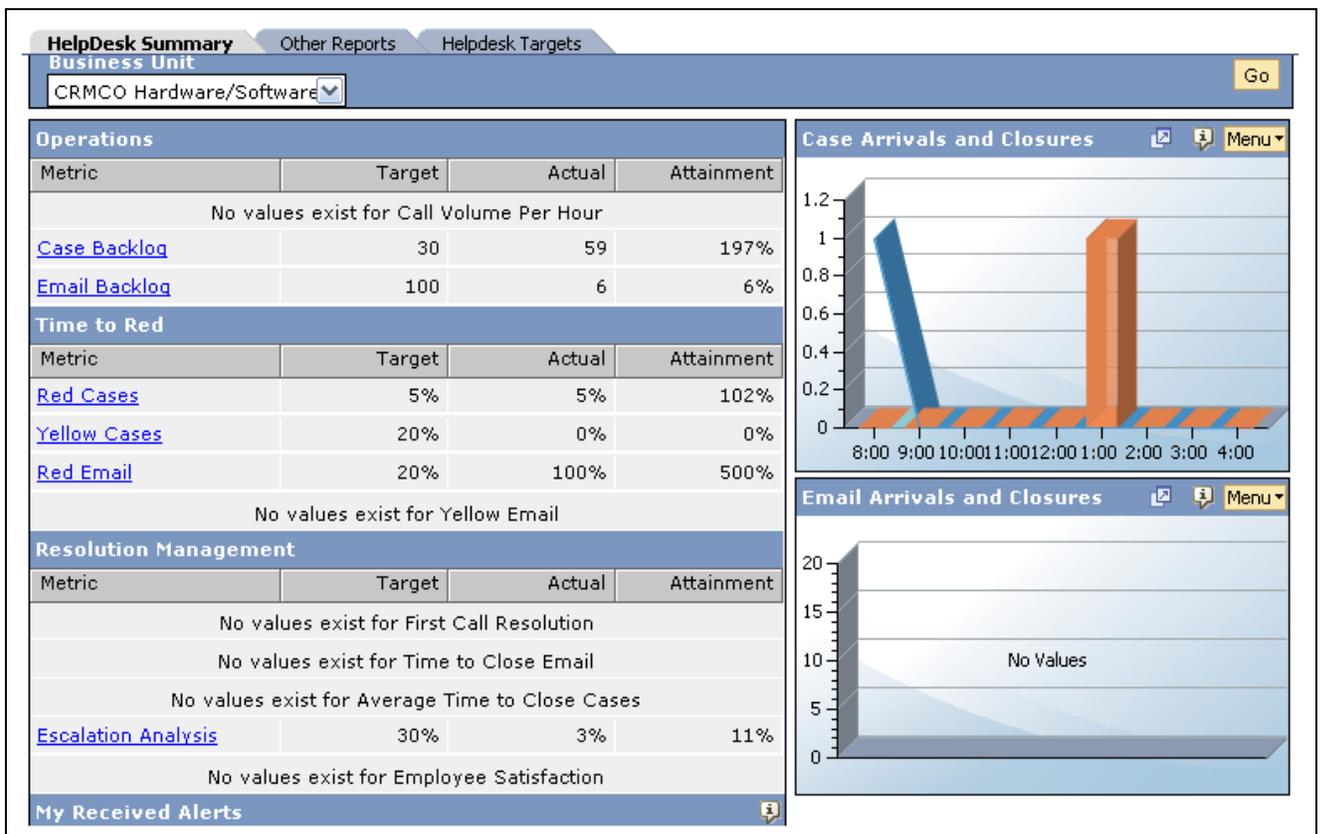
Email Arrivals and Closures

This view measures email arrivals and email closures within the last eight hours. The Y axis measures the number of emails. The X axis groups the data hourly for the last eight hours. The bar represents a count of the emails created within the last eight hours. The area represents a count of the emails closed in the last eight hours. From this view, you can drill to the Discovery - Closed Email report and access various action pages.

Note. When you have an arrivals report that has multiple colors with the same count, and one color overlaps the other, it can be difficult to distinguish the lines as separate values.

Using the Summary Page to Access Discovery Reports for PeopleSoft HelpDesk

Access the HelpDesk Summary page.



HelpDesk Summary page

The HelpDesk Summary page provides the same information as the Services Summary page. For additional information please refer to the section descriptions for the Service Summary page.

Using the Summary Page to Access Discovery Reports for PeopleSoft the HelpDesk for Human Resources

Access the HR HelpDesk Summary page.

HR HelpDesk Summary
Other Reports
HR Helpdesk Targets

Business Unit

HR Help Desk USA Go

Operations

Metric	Target	Actual	Attainment
Call Volume Per Hour	10	1	10%
Case Backlog	100	42	42%
Email Backlog	100	4	4%

Time to Red

Metric	Target	Actual	Attainment
Red Cases	10%	0%	0%
Yellow Cases	30%	0%	0%
Red Email	20%	100%	500%
Yellow Email	3%	0%	0%

Resolution Management

Metric	Target	Actual	Attainment
No values exist for First Call Resolution			
No values exist for Average Time to Close Email			
No values exist for Average Time to Close Cases			
Escalation Analysis	30%	2%	8%
No values exist for Employee Satisfaction			

My Received Alerts i

Arrivals and Closures Menu

Email Arrivals and Closures Menu

HR HelpDesk Summary page

This page provides the same information as the Services Summary page. For additional information please refer to the section descriptions for the Service Summary page.

Using the Operations Discovery Dashboard Pages

This section discusses how to:

- Use the Call Volume discovery report page.
- Use the Case Backlog discovery report page.
- Use the Email Backlog discovery report page.

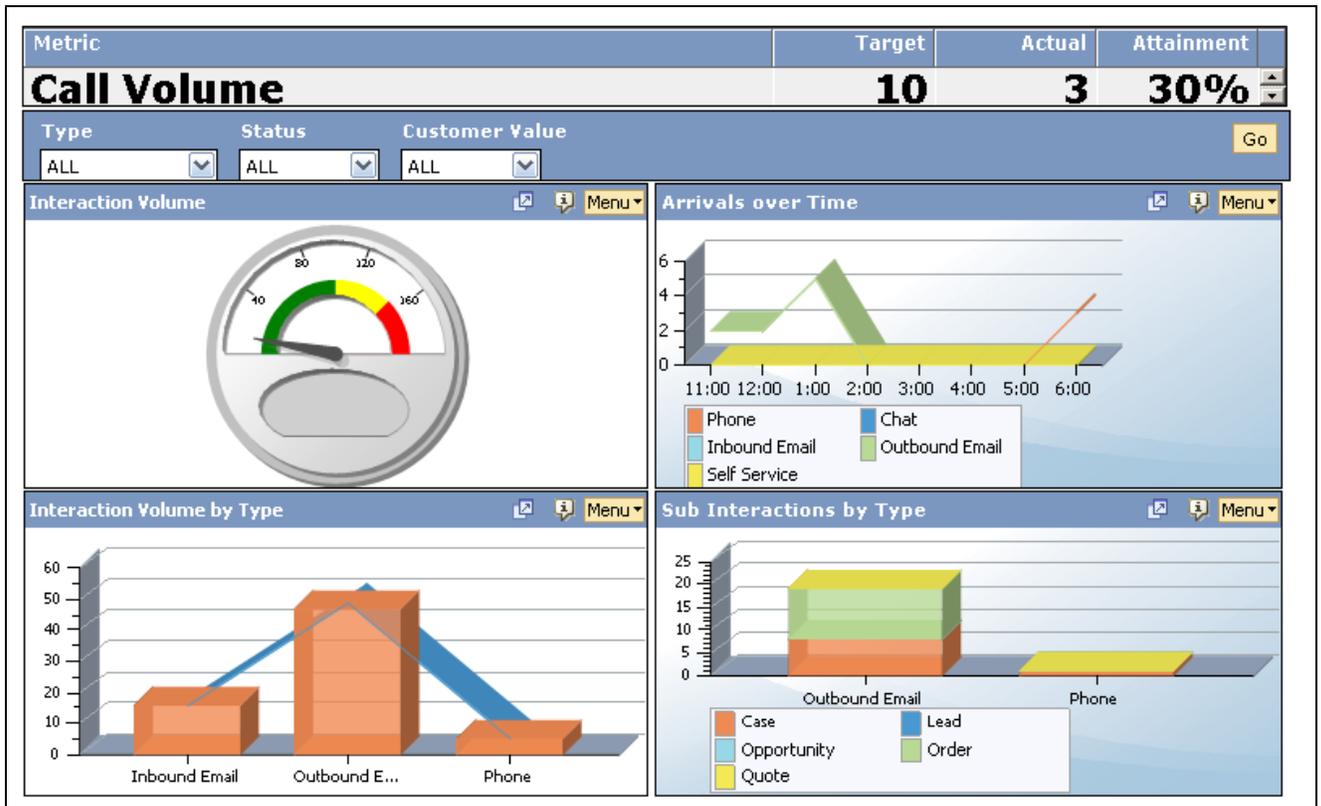
Note. The key metrics shown at that top of the discovery reports are the same as the key metrics from the Summary page. The business unit is defaulted from the Summary page. The other global filters default to *All*. You can change these filters and click Go to filter all the data in the views that appear within the page.

Pages Used to View the Operations Discovery Reports

Page Name	Object Name	Navigation	Usage
Call Volume	Discovery - Interactions	Click the Call Volume link in the Operations section on the Services, HelpDesk or HR HelpDesk Summary pages.	This dashboard is used to view and measure interaction volume, arrivals over time, interaction volume by type, and sub interactions by type.
Case Backlog	Discovery - Case Backlog	Click the Case Backlog link in the Operations section on the Services, HelpDesk or HR HelpDesk Summary pages.	This dashboard is used to view and measure case backlog by product group, case age by priority, global parent cases, and backlog by priority.
Email Backlog	Discovery - Email Backlog	Click the Email Backlog link in the Operations section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure email backlog by SLA status, group worklist, age, and category.

Using the Call Volume Discovery Report Page

Access the Call Volume discovery report page.



Call Interactions discovery report page

Interaction Volume

This view measures interaction volume. The report filters data to display interactions created in the last eight hours.

Arrivals Over Time

This view measures interaction arrivals over time. The Y axis measures the number of interactions. The X axis groups the view by the last 8 hours rolling. The red bar represents average interaction duration. The report filters data to display interactions created in the last 8 hours.

Interaction Volume by Type

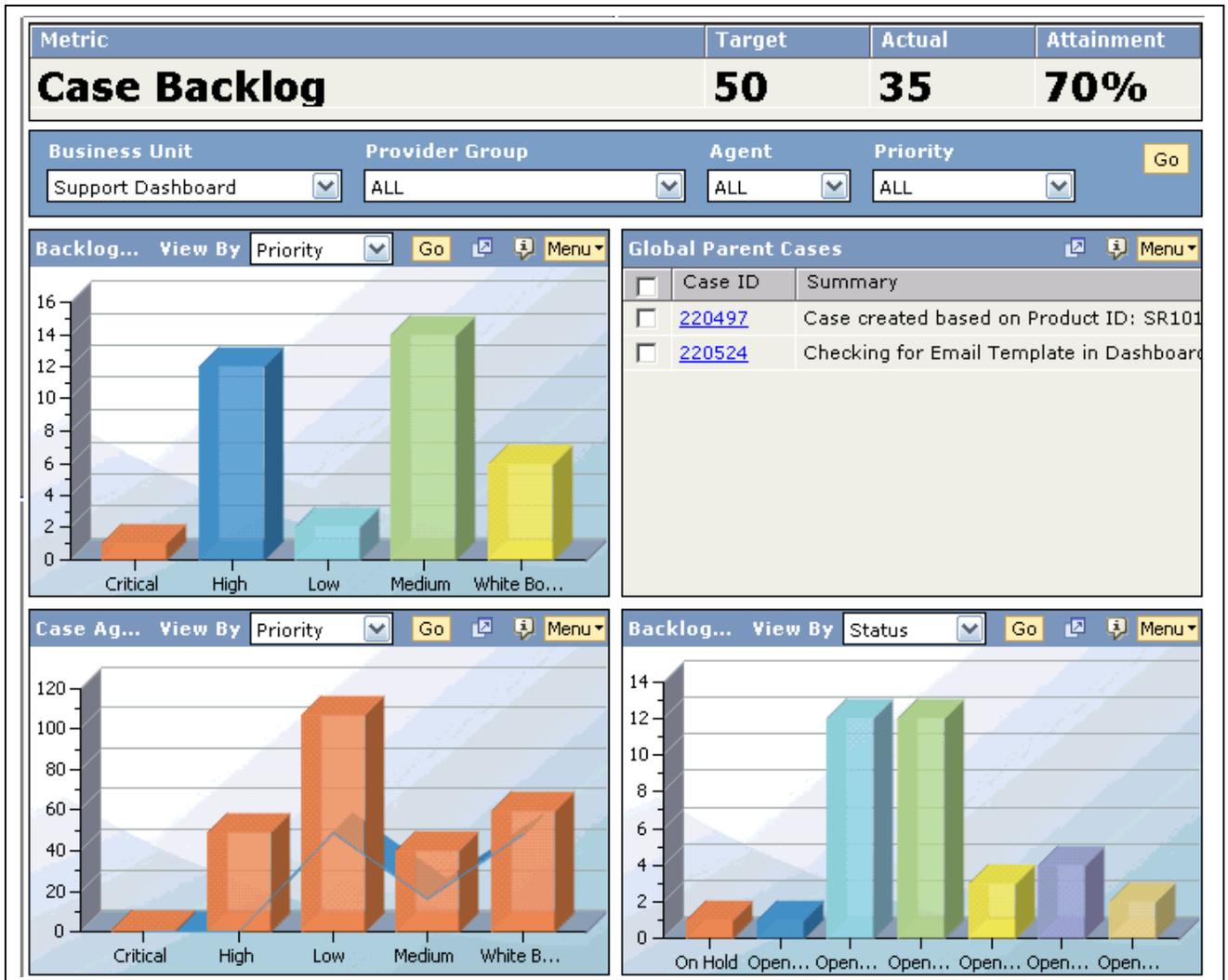
This view measures interaction volume by type. The Y axis measures number of interactions. The X axis groups the view by interaction type. The red bar represents the number of interactions created over the last week. The blue line represents number of interactions created over the previous 2 weeks.

Sub Interactions by Type

This view measures sub-interactions by type. The Y axis measures the number of sub-interactions. The X axis groups the view by interaction type.

Using the Case Backlog Discovery Report Page

Access the Case Backlog discovery report page.



Case Backlog discovery report page

Backlog by Priority

This view measures all backlog cases by priority. The Y axis measure the number of open cases. The X axis groups the report by priority, severity, or customer value. You can filter data to display all open and on hold cases.

Global Parent Cases

This view lists all open and on hold cases containing the parent case, case summary, and the number of child cases associated with each parent case.

Case Age by Priority

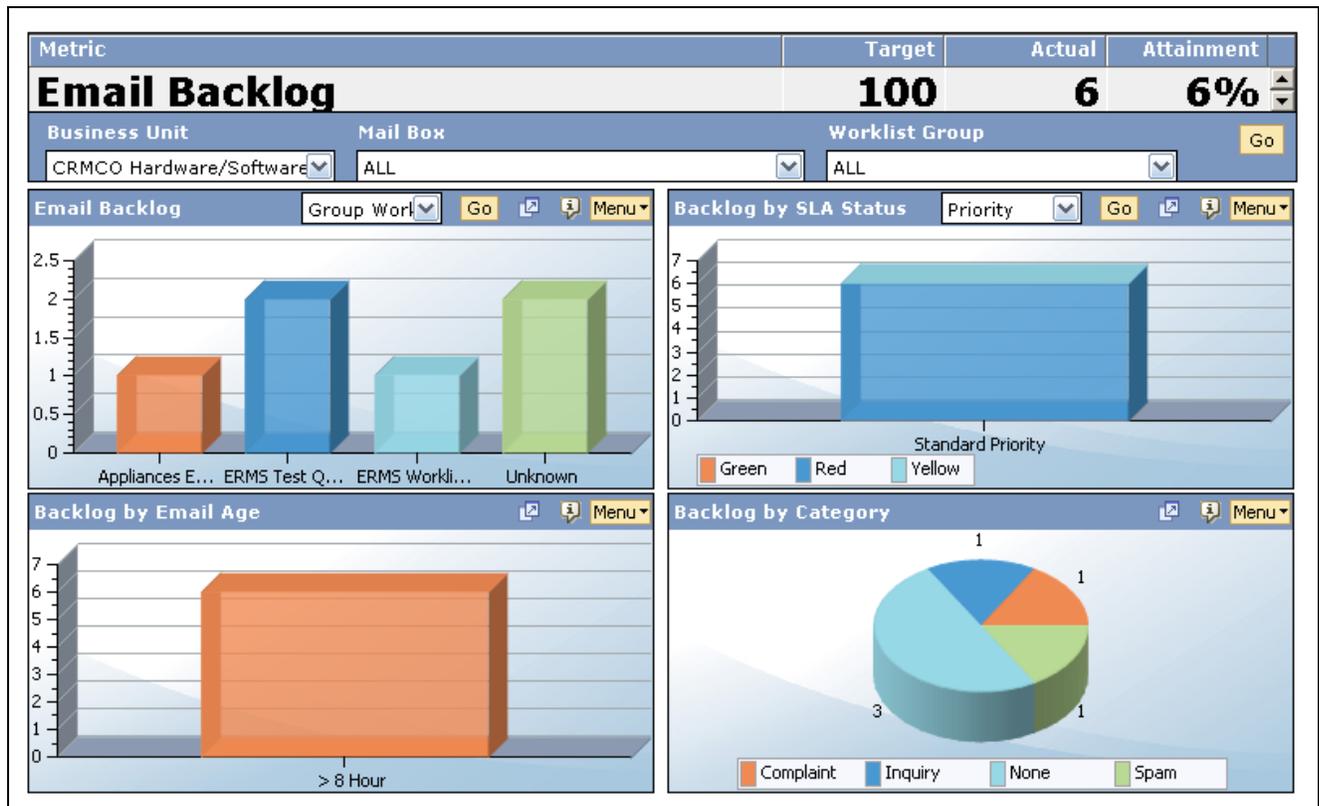
This view measures all backlog cases by priority. The Y axis measures the number of days. The X axis groups the report by priority, severity, or customer value. The bar represents the average number of days that cases are open and on hold. The line represents the average number of days to closed cases within the last 30 days.

Backlog by Product Group

This view measure all backlog cases by product group. The Y axis measure the number of open cases. The X axis groups the report by product group, priority, or status. You can filter data to display all open and on hold cases.

Using the Email Backlog Discovery Report Page

Access the Email Backlog discovery report page.



Email Backlog discovery report page

Email Backlog

This view measures email backlog. The Y axis measures the number of emails. The X axis groups the report by group worklist. The report filters data to display open inbound emails.

Backlog by SLA Status

This view measures email backlog by SLA status. The Y axis measures number of emails. The X axis groups the report by group worklist. The report filters data to display open inbound emails. Use this to view to review the assigned agents for the emails and reassign emails to other agents.

Backlog by Email Age

This view measures email backlog by age. The Y axis measures the number of emails. The X axis groups the report by timeframe. The report filters data to display open emails created in the last eight hours.

Backlog by Category

This view measures email backlog by category. The report filters data to display open inbound emails and groups by category.

Using the Time to Red Discovery Dashboard Pages

This section discusses how to:

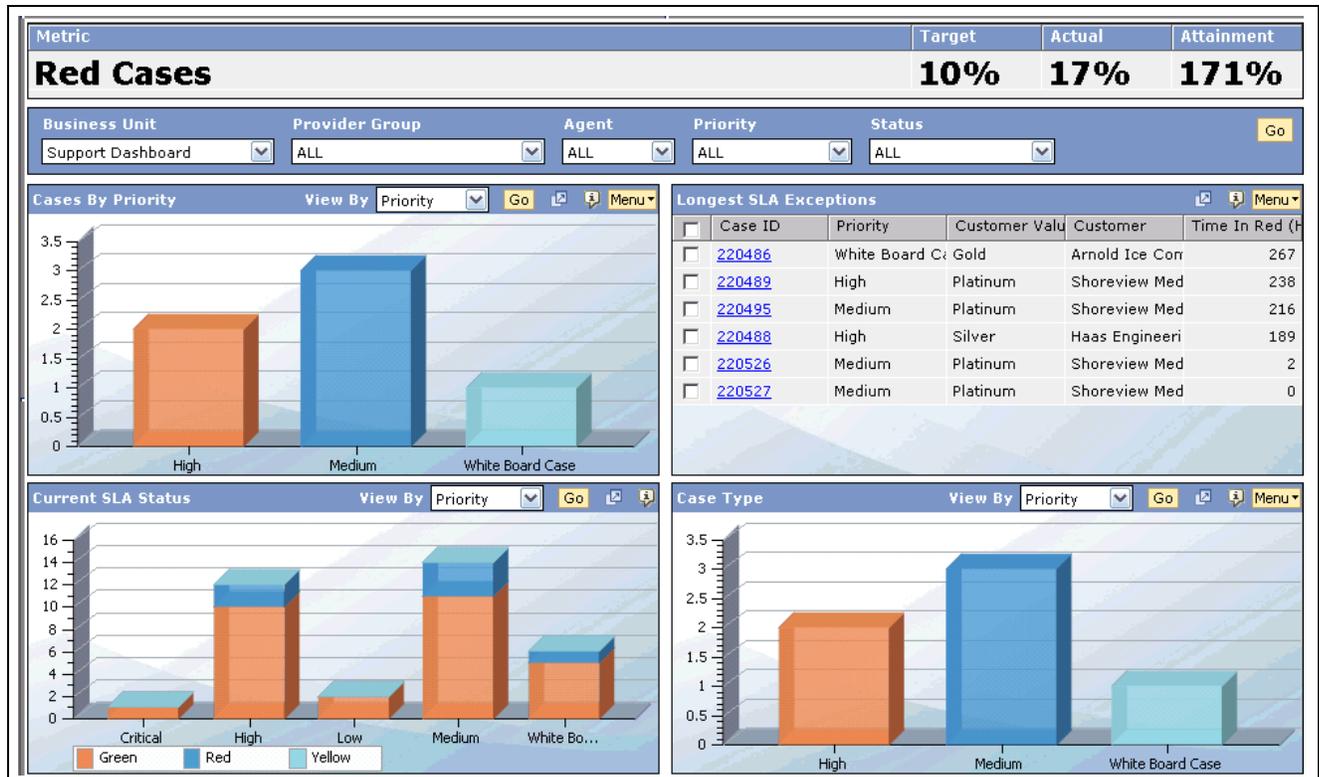
- Use the Red Cases discovery report page.
- Use the Yellow Cases discovery report page.
- Use the Red Email discovery report page.
- Use the Yellow Email discovery report page.

Pages Used to View the Time to Red Discovery Reports

Page Name	Object Name	Navigation	Usage
Red Cases	Discovery - Red Cases	Click the Red Cases link in the Time to Red section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to show red cases by priority, SLA exceptions that have the longest existence times, current SLA statuses, and red cases by priority.
Yellow Cases	Discovery - Yellow Cases	Click the Yellow Cases link in the Time to Red section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to show yellow cases by priority, cases approaching SLA exceptions, current SLA statuses, and yellow cases by priority.
Red Email	Discovery - Red Email	Click the Red Email link in the Time to Red section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure the number of red emails by worklist, category, age, priority, and product group.
Yellow Email	Discovery - Yellow Email	Click the Yellow Email link in the Time to Red section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure the number of yellow emails by worklist, category, age, priority, and product group.

Using the Red Cases Discovery Page

Access the Red Cases discovery report page.



Red Cases discovery report page

Case By Priority

This view measures red cases by priority. The Y axis measures number of cases. The X axis groups the report by priority. The report filters data to display all open red cases.

Longest SLA Exceptions

This view measures longest SLA exceptions. The report filters data to display all open red cases.

Current SLA Status

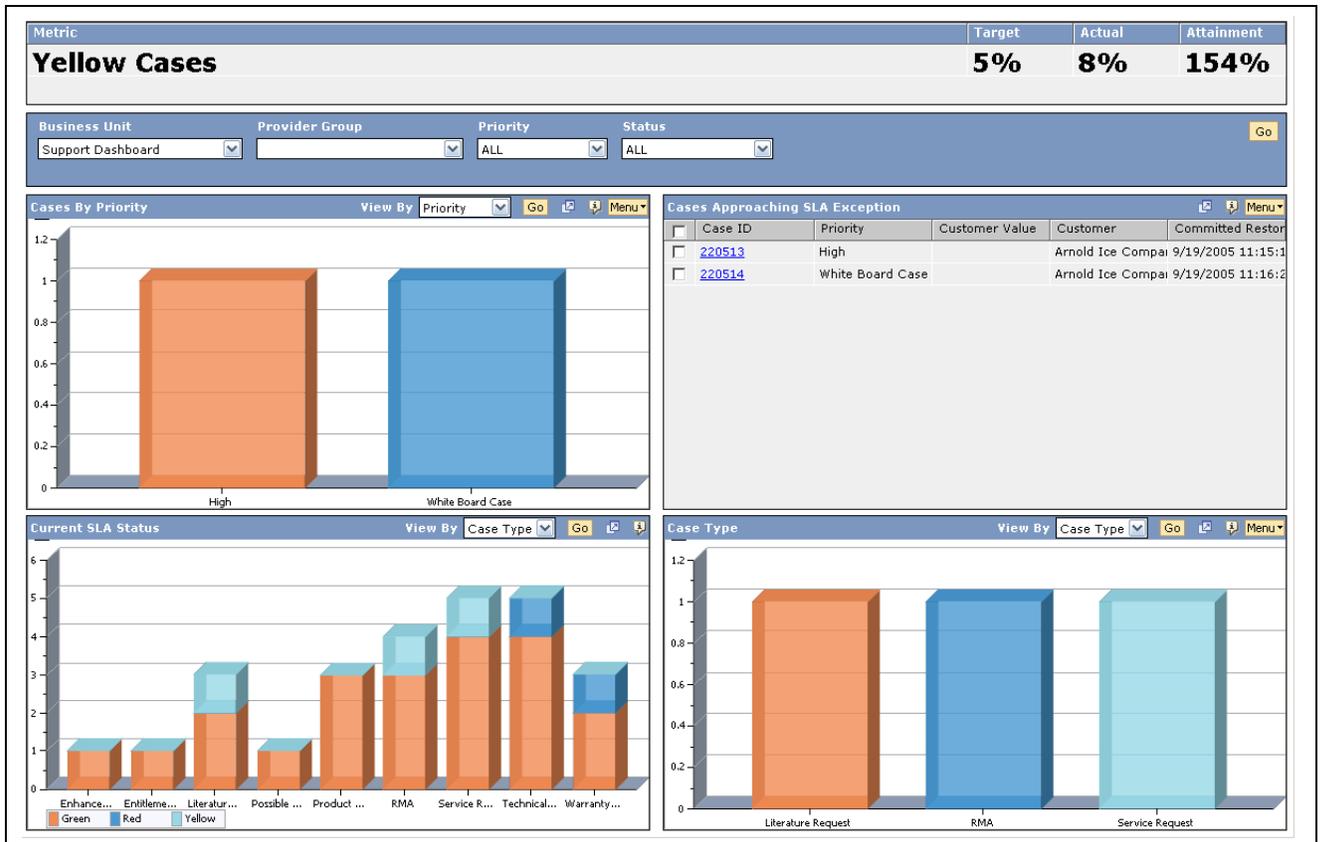
This view measures current SLA status. The Y axis measures number of cases. The X axis groups the report by priority. The report filters data to display all open cases.

Product Group

This view measures red cases by product group. The Y axis measures the number of cases. The X axis groups the report by product group. The report filters data to display all open red cases.

Using the Yellow Cases Discovery Page

Access the Yellow Cases discovery report page.



Yellow Cases discovery report page

Case By Priority

This view measures yellow cases by priority. The Y axis measures number of cases. The X axis groups the report by priority. The report filters data to display all open yellow cases.

Cases Approaching SLA Exception

This view measures cases approaching SLA exception. The report filters data to display all open yellow cases.

Current SLA Status

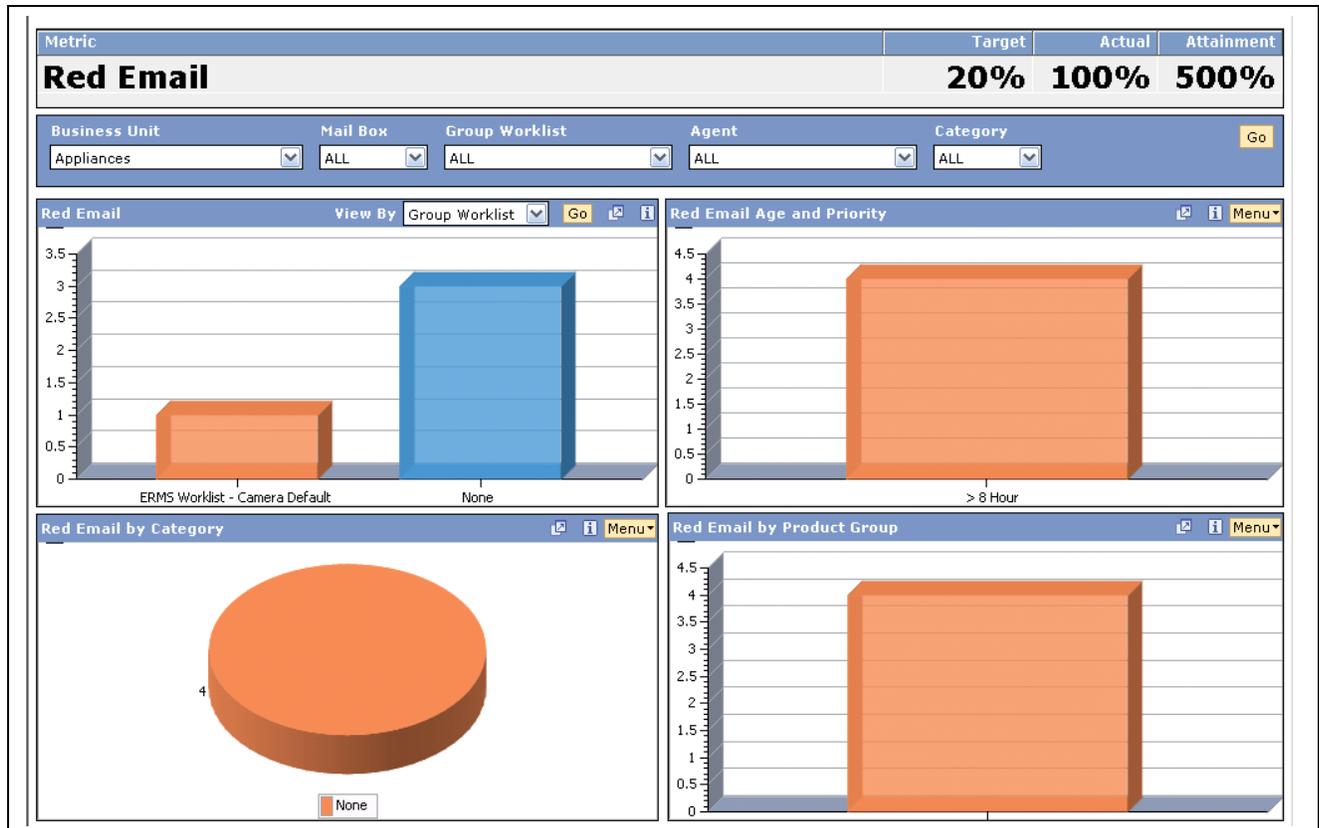
This view measures current SLA status. The Y axis measures number of cases. The X axis groups the report by priority. The report filters data to display all open cases.

Product Group

This view measures yellow cases by product group. The Y axis measures the number of cases. The X axis groups the report by product group. The report filters data to display all open yellow cases.

Using the Red Email Discovery Page

Access the Red Email discovery report page.



Red Email discovery report page

Red Email

This view measures red emails. The Y axis measures the number of emails. The X axis groups the report by worklist. The report filters data to display all open red emails.

Red Email Age and Priority

This view measures red emails by age and priority. The Y axis measures the number of emails. The X axis groups the report by timeframes. The report filters data to display all open red emails.

Red Email by Category

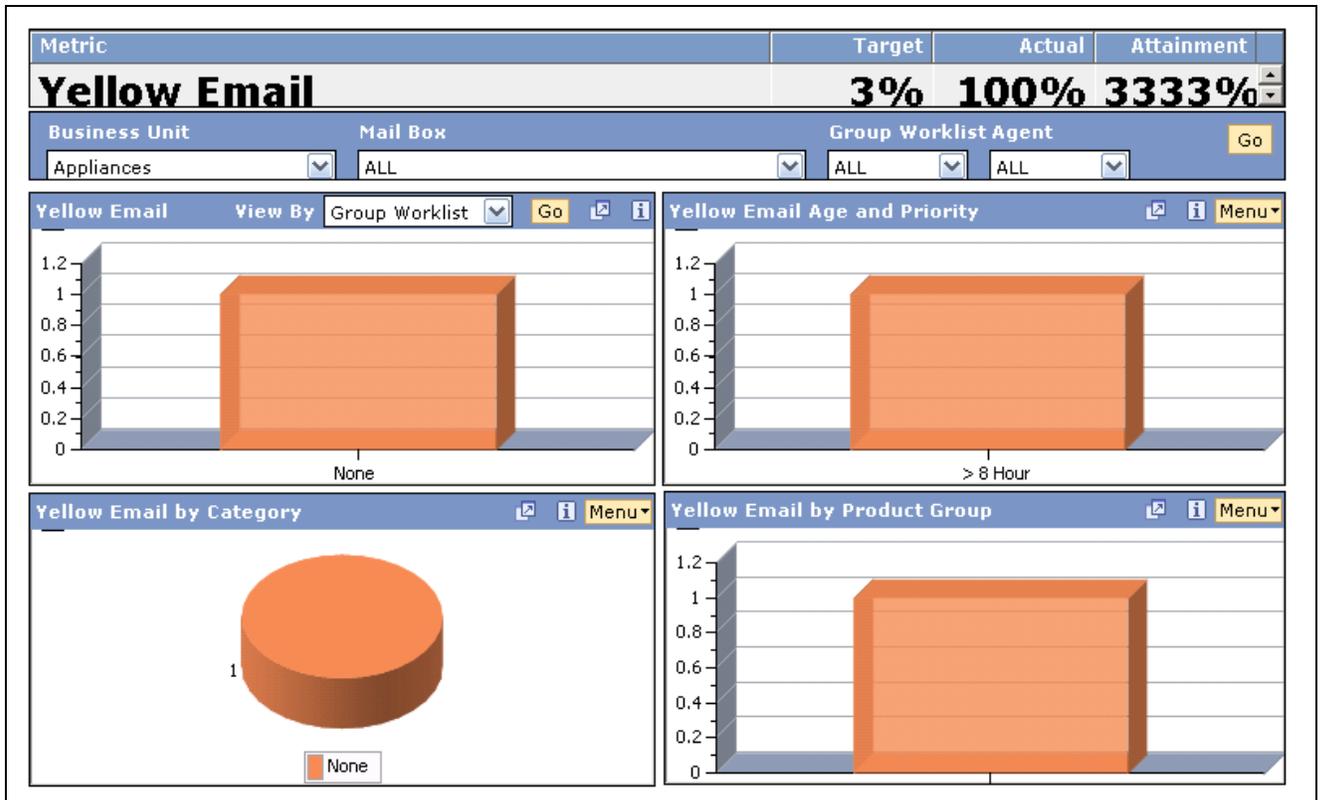
This view measures red emails by category. The Y axis measures the number of emails. The X axis groups the report by category. The report filters data to display all open red emails.

Red Email by Product Group

This view measures red emails by product group. The Y axis measures the number of emails. The X axis groups the report by product group. The report filters data to display all open red emails.

Using the Yellow Email Discovery Page

Access the Yellow Email discovery report page.



Yellow Email discovery report page

Yellow Email

This view measures yellow emails. The Y axis measures the number of emails. The X axis groups the report by worklist. The report filters data to display all open yellow emails.

Yellow Email Age and Priority

This view measures yellow emails by age and priority. The Y axis measures the number of emails. The X axis groups the report by timeframes. The report filters data to display all open yellow emails.

Yellow Email by Product Group

This view measures yellow emails by product group. The Y axis measures the number of emails. The X axis groups the report by product group. The report filters data to display all open yellow emails.

Yellow Email by Category

This view measures yellow emails by category. The Y axis measures the number of emails. The X axis groups the report by category. The report filters data to display all open yellow emails.

Using the Resolution Management Discovery Dashboard Pages

This section discusses how to:

- Use the First Call Resolution Rate discovery report page.
- Use the Average Time to Close Email discovery report page.
- Use the Average Time to Close discovery report page.
- Use the Escalation Analysis discovery report page.
- Use the Customer Satisfaction discovery report page.

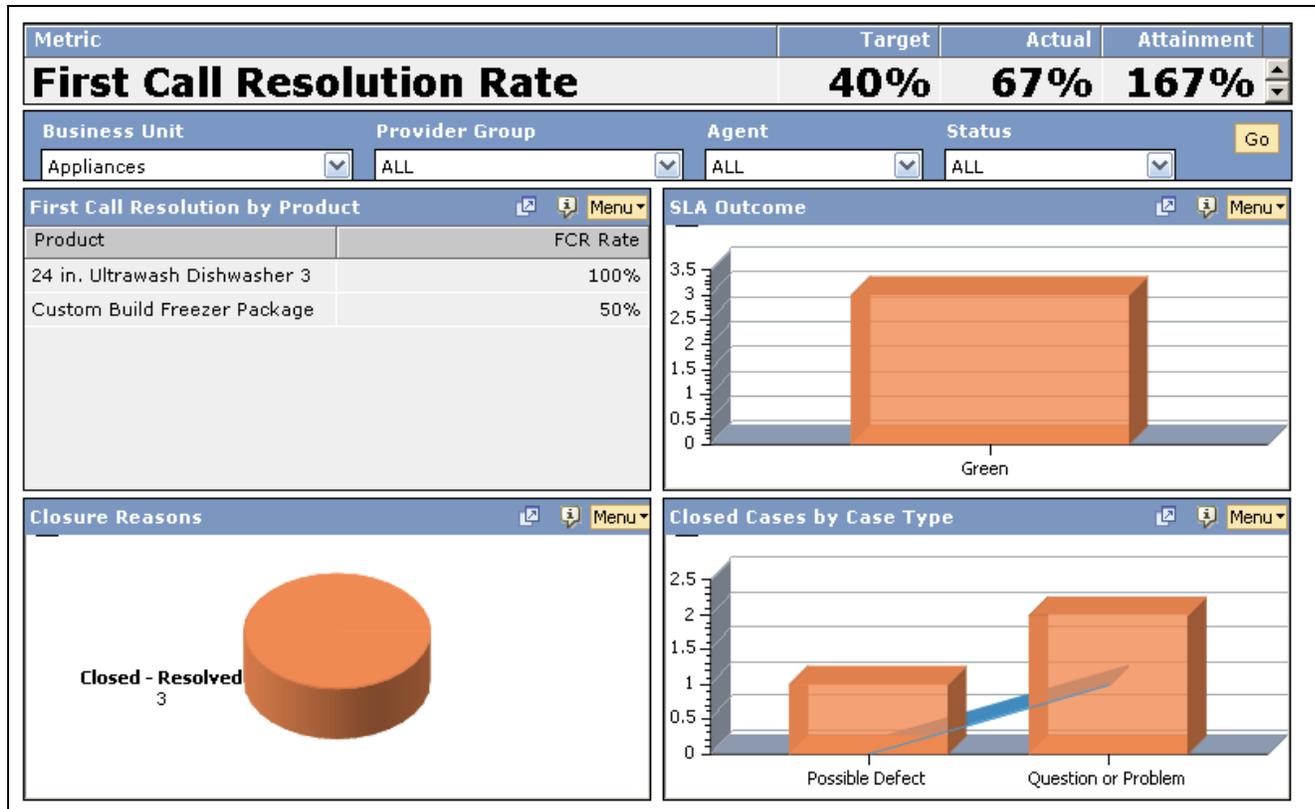
Pages Used to View the Resolution Management Discovery Reports

Page Name	Object Name	Navigation	Usage
First Call Resolution Rate	Discovery - Closed Case Analysis	Click the First Call Resolution Rate link in the Resolution Management section from the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to determine the number of cases that were resolved on the first call. It also shows how closely SLAs have been met, the reasons for case closures, and the categories that the case closure reasons are associated with.
Average Time to Close Email	Discovery - Time to Close Email	Click the Average Time to Close Email link in the Resolution Management section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure the average time to close emails, the number of agent-handled emails closed within specific timeframes, and the average time to close emails by category and product group.
Time to Close	Discovery - Time to Close	Click the Average Time to Close Cases link in the Resolution Management section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure the average time to close cases and the length of time it takes to close cases. This view is also measuring the average time taken to close a case by product or category (HelpDesk and HR HelpDesk). You can also compare the time it takes to close cases with the time it takes to close cases that were placed on hold.

Page Name	Object Name	Navigation	Usage
Escalation Analysis	Discovery - Escalation Analysis	Click the Escalation Analysis link in the Resolution Management section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure case escalation by priority, severity and customer value. You can also view the cases with the most recent escalations, measure case escalation by product group, priority, case type, or status. You can also view the number of times a case was escalated by product and the number of cases affected per product.
Customer Satisfaction	Discovery - Customer Satisfaction Analysis	Click the Customer Satisfaction or Employee Satisfaction link in the Resolution Management section on the Services, HelpDesk, or HR HelpDesk Summary pages.	This dashboard is used to view and measure customer satisfaction by product group, product, case type, or priority. You can also view customer satisfaction levels versus service level agreement outcomes and time to close cases. Note. For HelpDesk and HR HelpDesk, this report is called Employee Satisfaction.

Using the First Call Resolution Rate Discovery Page

Access the First Call Resolution Rate discovery page.



First Call Resolution Rate discovery page

First Call Resolution by Category

This view measures first call resolution (FCR) by category. Each row shows a specific category and its FCR rate. The FCR rate is the percent of cases closed for the category that were closed by first contact. The report filters data to display only cases closed in the last seven days.

SLA Outcome

This view shows how closely SLAs have been met by measuring SLA outcomes. The X axis groups the cases by SLA outcome. The Y axis displays the number of cases. The bars display the number of cases closed in the last seven days. The line displays the number of cases closed in the previous week.

Closure Reasons

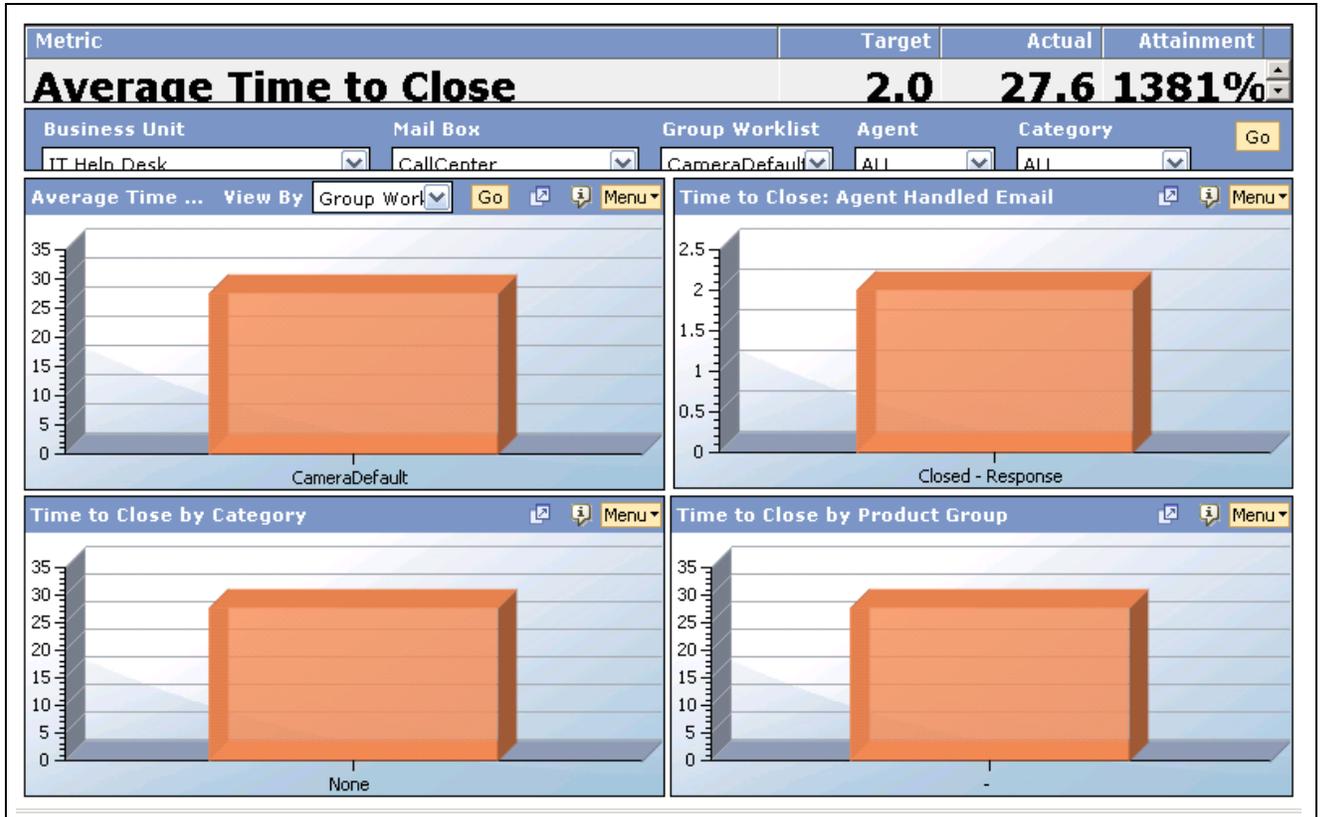
This view measures case closure reasons. Each pie slice represents a specific case status. The number of cases closed with that status is shown for each slice. The report filters data to display only cases closed in the last seven days.

Closed Cases by Product Group

This view shows closed cases by product group. The X axis groups the closed cases by product group. The Y axis displays the number of cases. The bars display the number of cases closed in the last seven days. The line displays the number of cases closed in the previous week.

Using the Average Time to Close Email Discovery Page

Access the Average Time to Close Email discovery page.



Average Time to Close Email discovery page

Average Time to Close

This view measures average time to close email. The Y axis measures average time to close an email in hours. The X axis groups the report by group worklist. The report filters data to display emails closed in the last 24 hours.

Time to Close: Agent Handled Email

This view measures the number of agent handled emails closed in specific timeframes. The Y axis measures the number of emails to which there were replies. The X axis groups the report by timeframes (<1 hour, 1-4 hours, 4-8 hours, >8 hours). The report filters data to display emails closed in the last 24 hours that were not auto-responses.

Time to Close by Category

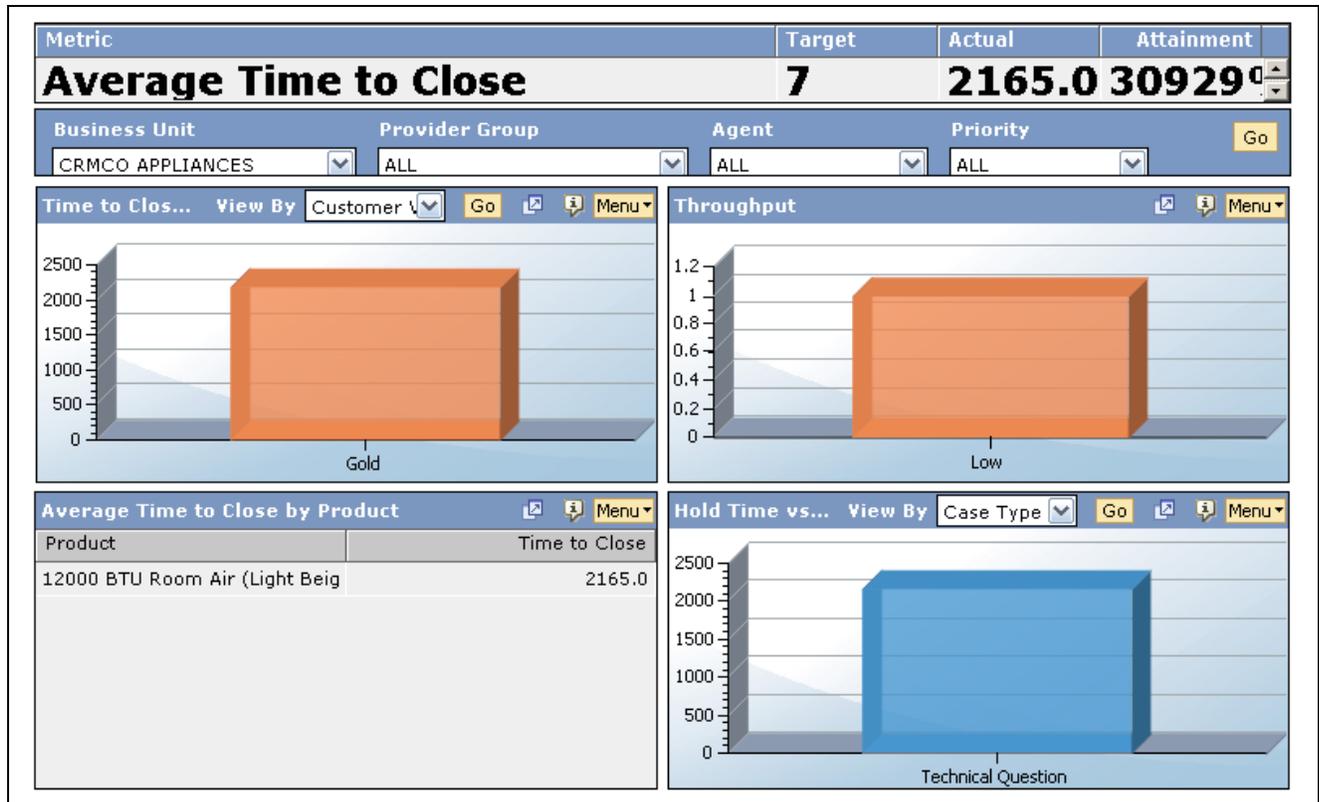
This view measures average time to close email by category. The Y axis measures average time to close an email in hours. The X axis groups the report by category. The report filters data to display emails closed in the last 24 hours.

Time to Close by Product Group

This view measures average time to close. The Y axis measures average time to close an email in hours. The X axis groups the report by product group. The report filters data to display emails closed in the last 24 hours.

Using the Average Time to Close Discovery Page

Access the Average Time to Close discovery page.



Average Time to Close discovery page

Time to Close by Priority

This view measures the average time to close cases.

Throughput

This view shows how long it takes to close cases by measuring high, medium, and low throughput. The Y axis measures the number of closed cases. The X axis groups the report by high, medium, and low throughput. The bar filters data by cases that have been closed within the last 7 days. The line represents cases that have been closed last week (7 to 14 days).

Average Time to Close by Product

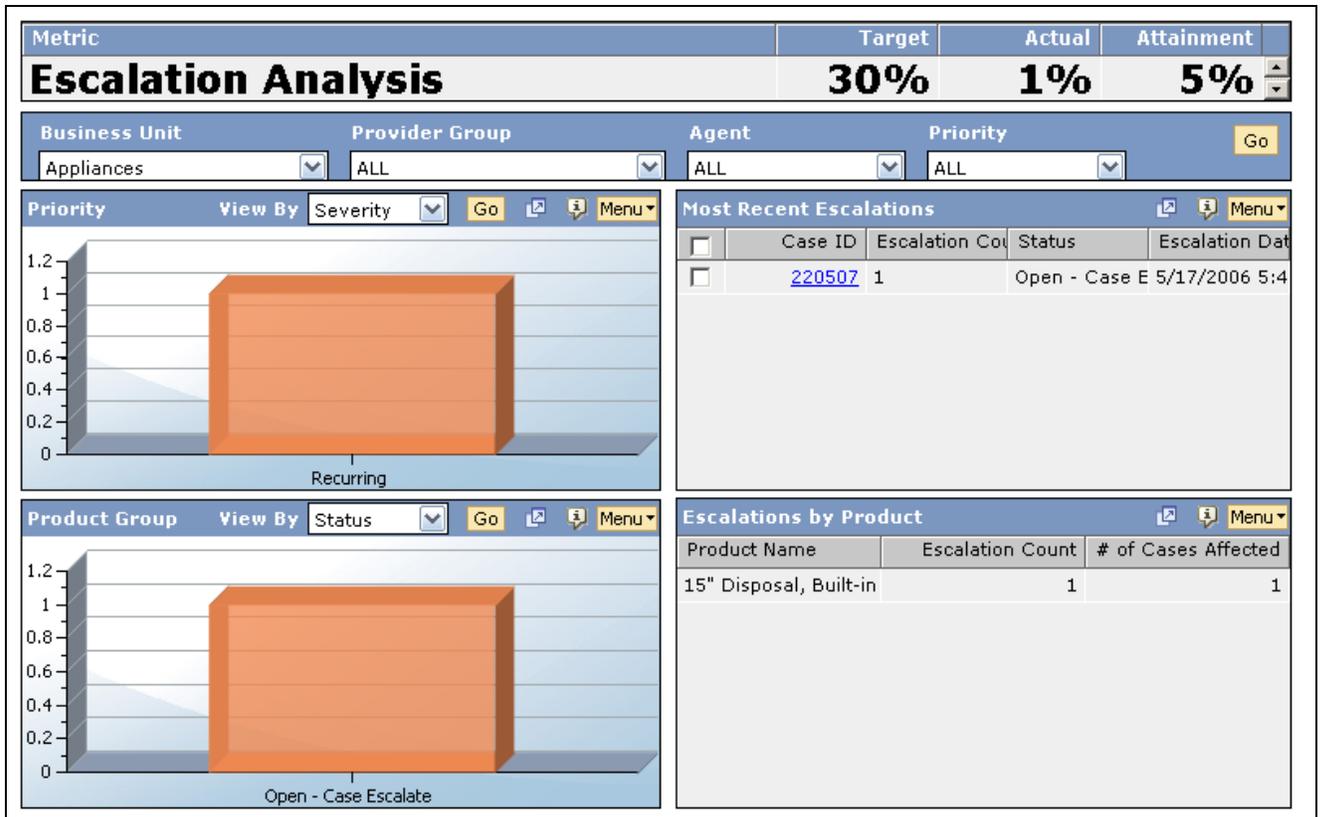
This view lists the average time to close cases (in days) by product. The report filters data to display cases closed in the last 7 days.

Hold Time vs Time to Close

This view measures the time taken to close cases compared with time taken to close cases that were placed on hold. The Y axis measures the average time to close cases. The X axis groups the report by product group or priority.

Using the Escalation Analysis Discovery Page

Access the Escalation Analysis discovery page.



Escalation Analysis discovery page

Priority

This view measures case escalation by priority, severity or customer value. The Y axis measures total count of escalations. The X axis groups the report by priority, severity or customer value. You can drill down on bar chart to expand the view to show a detailed list of affected cases. The report filters data to display open cases and on-hold cases that have been escalated.

Most Recent Escalations

This view measures most recent escalations. It shows cases with most recent escalations on top. The report filters data to display open cases and on-hold cases that have been escalated.

Product Group

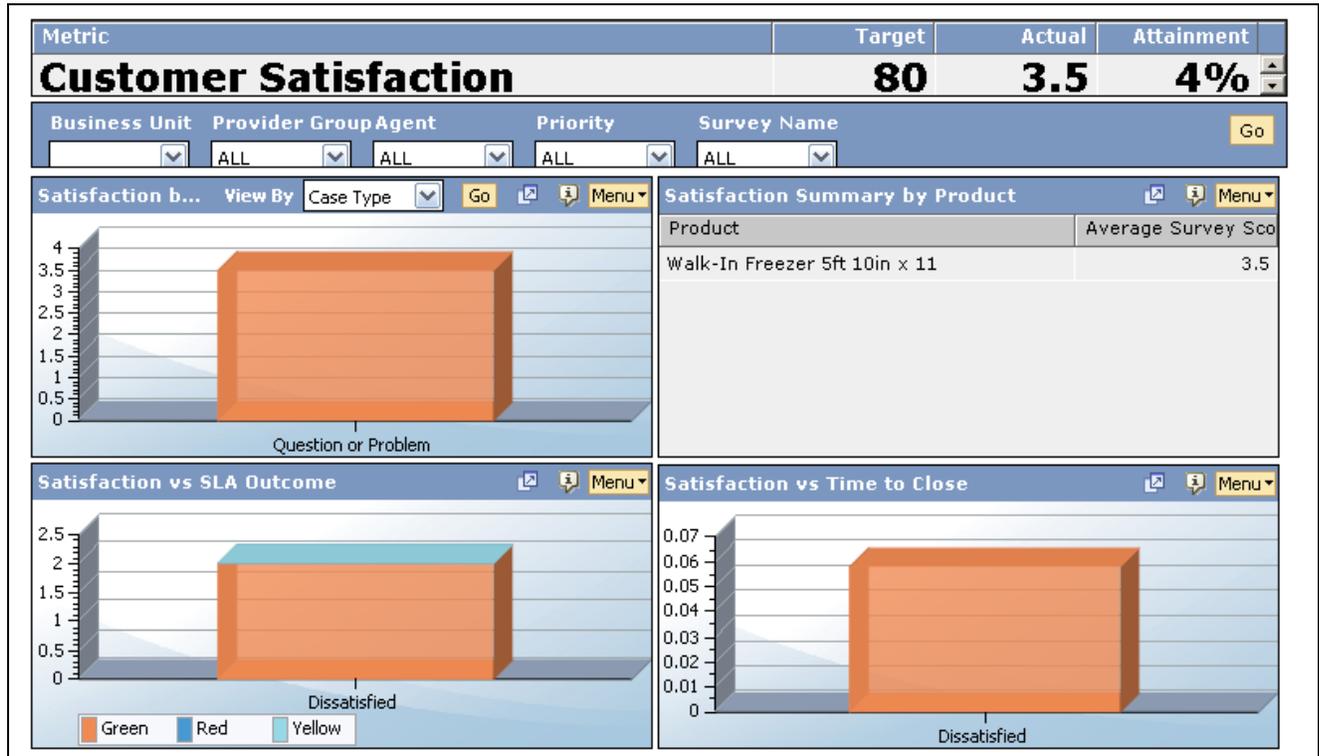
This view measures case escalation by product group, priority, case type or status. The Y axis measures total count of escalations. The X axis groups the report by product group. You can also drill down on the bar chart to expand the view to reveal another bar chart that is grouped by product. If you drill down further you can view a detailed list of affected cases. The report filters data to display open cases and on-hold cases that have been escalated.

Escalations by Product

This view measures escalations by product. It shows the number of times cases were escalated and number of cases affected per product. You can drill down on each product in the list to view a detailed list of affected cases. The report filters data to display open cases and on-hold cases that have been escalated.

Using the Customer Satisfaction Discovery Page

Access the Customer Satisfaction discovery page.



Customer Satisfaction discovery page

Note. For PeopleSoft HelpDesk and HelpDesk for Human Resources, this report is called Employee Satisfaction.

Satisfaction by Provider Group

This view measures customer satisfaction by provider group. The Y axis measures the average survey score. The X axis groups the report by provider group. The report filters data to display cases closed in the last 90 days and survey scores greater than zero.

Satisfaction Summary by Product

This view lists customer satisfaction by product. The report filters data to display cases closed in the last 90 days and survey scores greater than zero.

Satisfaction vs SLA Outcome

This view measures customer satisfaction verses service level agreement outcomes. The Y axis measures the sum of red, yellow, and green cases. The X axis groups the report by survey rating. The report filters data to display cases closed in the last 90 days and survey scores greater than zero. The red bar represents green cases that have met the required restore date/time. The blue bar represents red case that missed the restore date/time. The light blue bar represents yellow cases that almost missed the restore date/time.

Satisfaction vs Time to Close

This view measures Customer Satisfaction verses time to close cases. The Y axis measures the average time to close cases in hours. The X axis groups the report by survey rating. The report filters data to display cases closed in the last 90 days and survey scores greater than zero.

Using the Other Discovery Report Pages

This section discusses how to:

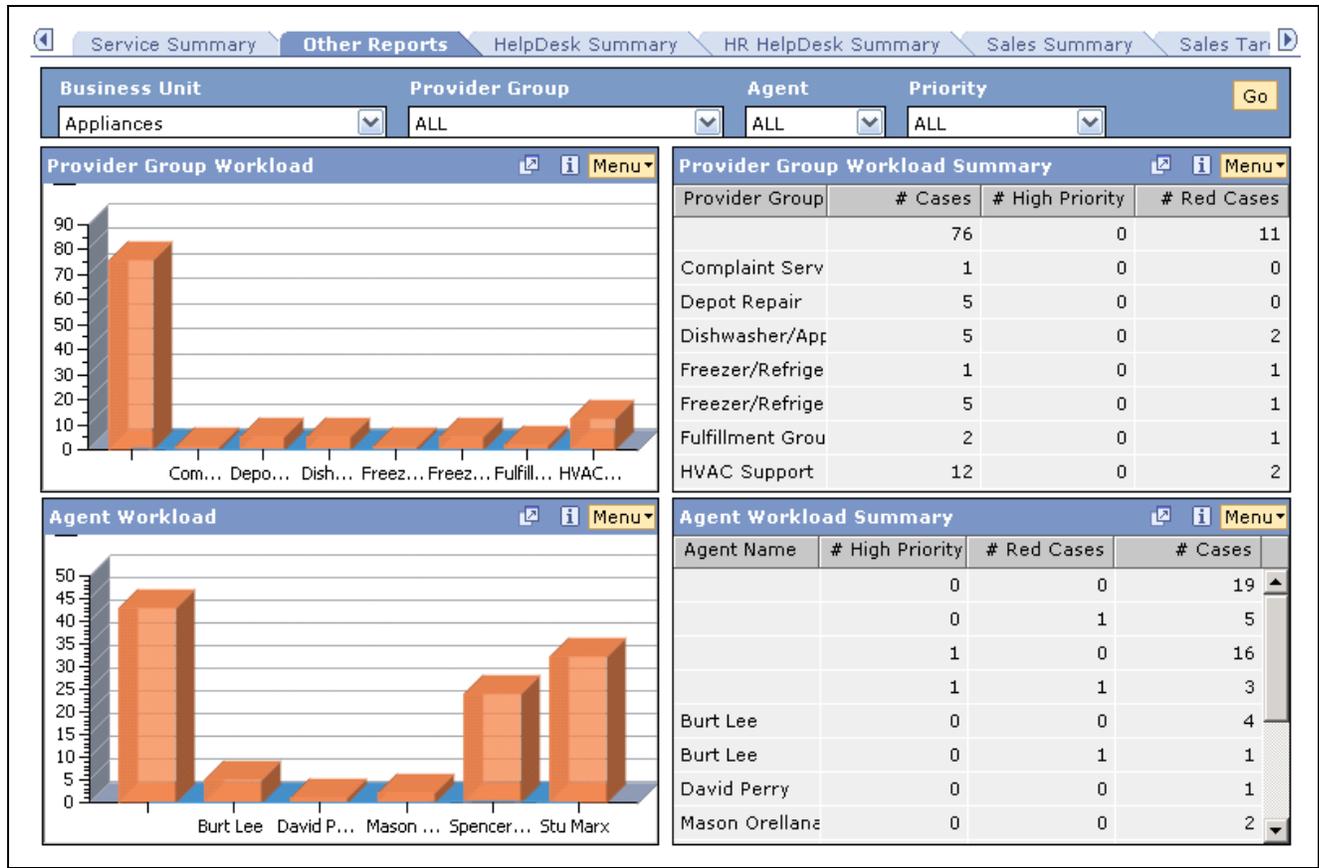
- Use the Group and Agent Case Load discovery report page.
- Use the Email Workload Capacity discovery report page.

Pages Used to View the Other Discovery Reports

Page Name	Object Name	Navigation	Usage
Group and Agent Case Load	Discovery - Group and Agent Case Load, Email	Click My Dashboards, Other Reports, Case Workload.	This dashboard is used to view and measure workload by provider group and agent.
Email Workload Capacity	Discovery - Email Workload Capacity	Click My Dashboards, Other Reports, Email Workload Click the Priority or SLA Status link from the Menu button on the Provider Group Workload and Agent Workload dashboards.	This dashboard is used to view and measure email workload capacity by group worklist and agent.

Using the Group and Agent Case Load Discovery Report Page

Access the Group and Agent Case Load discovery report page.



Group and Agent Case Load discovery report page

Provider Group Workload

This view measures workload by provider group. The Y axis measures the number of cases. The X axis groups the report by provider group. The red bars represent the number of cases that are open or on hold. The blue line represents the daily average number of cases closed in the last seven days.

Provider Group Workload Summary

This view measures workload by provider group. It counts the number of high-priority cases that are open, the number of red cases that are open, and the total number of open cases.

Agent Workload

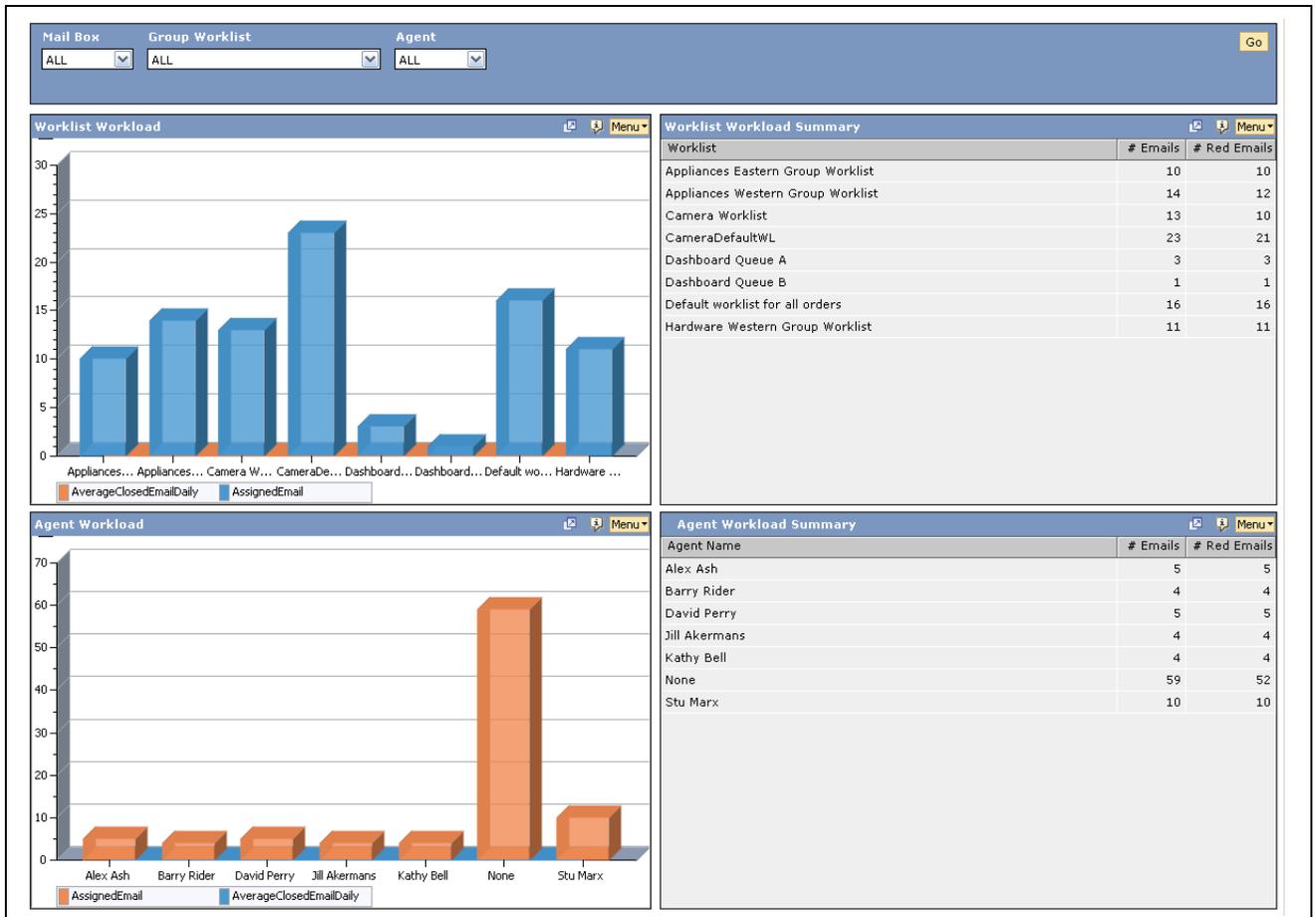
This view measures workload by agent. The Y axis measures the number of cases. The X axis groups the report by agent. The red bars represent the number of cases that are open or on-hold. The blue line represents the daily average number of cases closed in the last seven days.

Agent Workload Summary

This view measures workload by agent. It counts the number of high-priority cases that are open, the number of red cases that are open, and the total number of open cases.

Using the Email Workload Capacity Discovery Report Page

Access the Email Workload Capacity discovery report page.



Email Workload Capacity discovery report page

Worklist Workload

This view measures worklist workload. The Y axis measures the number of emails assigned. The X axis groups the report by group worklist. The blue line represents the average number of emails closed on a daily basis for the previous seven days. The red bar represents the number of emails assigned to group worklists.

Worklist Workload Summary

This view measures the number of high-priority emails and red emails per group worklist.

Agent Workload

This view measures agent workload. The Y axis measures the number of emails assigned. The X axis groups the report by agent. The blue line represents the average number of emails closed daily for the previous seven days. The red bar represents the number of emails assigned to agents.

Agent Workload Summary

This view measures the number of high-priority and red emails per agent.

Executing Actions from the Service Dashboards

This section discusses how to:

- Add case notes.
- Send email to an assigned agent.
- Send an email to an agent's manager.
- Send email to a contact center manager.
- Send email to a customer contact.
- Escalate cases.
- Reassign cases.
- Reassign email.
- Update case priorities.
- Update case statuses.
- Relate cases to parent case.
- Create case tasks.

Note. The Case ID appears as a link on many of the action pages. Clicking this link opens a new window and the corresponding case in PeopleSoft CRM. To select a case or contact on the case on the email action pages, click the Summary field or any other field in the grid that is not a link.

Pages Used to Execute Actions from the Service Dashboards

Page Name	Object Name	Navigation	Usage
Add Case Note	Action - Add Case Note	Select the Action - Add Case Note link from the Menu drop-down list.	Add notes to cases.
Email Assigned Agent	Action - Email Assigned Agent	Select the Action - Email Assigned Agent link from the Menu drop-down list.	Send an email to the assigned agent.
Email Assigned Agent Manager	Action - Email Assigned Agent Manager	Select the Action - Email Assigned Agent Manager link from the Menu drop-down list.	Assign and compose emails about specific cases.
Email Contact Center Manager	Action - Email Contact Center Manager	Select the Action - Email Contact Center Manager link from the Menu drop-down list.	Send emails to contact center managers for selected cases.
Email to Customer Contact	Action - Email to Customer Contact	Select the Action - Email to Customer Contact link from the Menu drop-down list.	Send emails to customer contacts for selected cases.
Escalate Cases	Action - Escalate Cases	Select the Action - Escalate Cases link from the Menu drop-down list.	Change the escalation status of selected cases.
Reassign Cases	Action - Reassign Cases	Select the Action - Reassign Cases link from the Menu drop-down list.	Reassign cases to provider groups and agents.
Reassign Email	Action - Reassign Email	Select the Action - Reassign Email link from the Menu drop-down list.	Reassign emails to a group worklist or agent.
Update Priority	Action - Update Priority	Select the Action - Update Priority link from the Menu drop-down list.	Update the priority status of cases.
Update Status	Action - Update Status	Select the Action - Update Status link from the Menu drop-down list.	Update the status of cases.
Relate Cases	Action - Relate Case	Select the Action - Relate Case link from the Menu drop-down list.	Create parent and child relationships between cases.
Create Case Task	Action - Create Case Task	Select the Action - Create Case Task link from the Menu drop-down list.	Create tasks for specific cases.

Adding Case Notes

Access the Add Case Note action page.

Add Case Note

Step 1: Select Cases to add a Note

<input type="checkbox"/>	Case ID	Summary	Agent	Hours Remaining for Entitled Rest	Status
<input type="checkbox"/>	14	The computer hard drive is ma...	Tyson Bruno		Case Canceled
<input type="checkbox"/>	138	Steps to remove frost build-up ...	Alan Bailey		Closed - Resolved
<input type="checkbox"/>	140	Steps to remove strange odor ...	Alan Bailey		On Hold
<input checked="" type="checkbox"/>	220335	Customer complains that more ...			Open - New Case
<input type="checkbox"/>	220418	Owner's manual request for rep...		-2411.72	Open - Fulfillment
<input type="checkbox"/>	220445	test	Barry Rider		Open - New Case
<input type="checkbox"/>	220449	Test			Open - New Case

Step 2: Add Note Text

Note	Call customer on cell phone 555-1212
-------------	--------------------------------------

Review Summary and Status

Case ID	Summary	Note Text	Status
220335	Customer complains that more color options n...	Call customer on cell phone 555-1212	Processing

Add Case Note action page

To add case notes to selected cases:

1. Select the cases for which you want to add case notes.
2. Enter the note in the Note field.
3. Click Add Note.
4. Review the results in the Review Summary and Status section.

Sending Email to an Assigned Agent

Access the Email Assigned Agent action page.

Email Assigned Agent

Step 1: Click on Summary to Select Case

Case ID	Summary	Priority	Status	Customer	Contact	Assigned Agent
1	The Ice Maker is broken.	Medium	Open - Awaiting User	Savannah Lee	Savannah Lee	Mason Orellana
2	Dishwasher is not cleaning t	Medium	Open - New Case	MMA Property Management	Fred Albright	Teresa Pine
3	Air Conditioner is not coolin	Medium	Open - New Case	Sparkle Clean Laundromats	Jimmy Boyd	Mason Orellana
5	Cleaning the Dish Washer	Medium	Open - New Case	Tomas Santiago	Tomas Santiago	David Perry
9	Refrigerator condensor coil	Medium	Open - New Case	MMA Property Management	Fred Albright	Alan Bailey
10	Ice maker is not working.	Medium	Open - New Case	Sparkle Clean Laundromats	Jimmy Boyd	None
11	Refrigerator light is always c	Medium	Open - New Case	Sparkle Clean Laundromats	Jimmy Boyd	David Perry
116	Problem with the Dishwashe	Medium	Open - New Case	MMA Property Management	Barb Johnson	Mason Orellana
117	Air is not cool enough	Medium	Open - New Case	MMA Property Management	Bill Hauser	None

Step 2: Compose Email

Email Recipients

To:

CC:

BCC:

Template:

Subject:

Message:

Step 3: Confirmations

Recipient	Case ID	Action Status	Action Error Message
crmqa@yahoo.com	2	Submitted	

Email Assigned Agent action page

To email an assigned agent:

1. Click the case summary text that corresponds to the case for which you want to send an email.
2. Compose the email.
3. Click Send.
4. Review the results in the Confirmations section.

Sending an Email to an Agent's Manager

Access the Email Assigned Agent Manager action page.

Email Assigned Agent Manager

Step 1: Select Case to Email

Case ID	Summary	Priority	Status	Customer	Assigned Agent	Contact	Supervisor
220326	Getting errors when installing	Medium	Open - New Case	Anonymous User	Burt Lee	None	Leonard Westphal
220327	Next door neighbor is waterin	Medium	Open - New Case	Anonymous User	Jill Akermans	None	Carol Burns
220328	Suspects someone is using C:	Medium	Open - New Case	Ted Pepper	Kathy Bell	None	Spencer Underwood
220329	Concerned that someone is u	Medium	Open - New Case	Altima Corp.	Edward Allen	Tomas Santiago	Marcia Fitzwilliams
220330	Customer complains of poor c	High	Register	Stan Pepper	Hans Gruber	None	Connie Zap
220331	Would like more information a	Medium	Register	Bay Insurance Agency	Christopher DeFonzo	Vincent Bell	
220332	Customer requests update or	Medium	Register	Great America Consulting, In	None	Lamar Dodd	-
220333	Would like more information o	Medium	Register	Saratoga Container Company	None	Scott Arnold	-
220334	Would like to know procedure	Low	Open - New Case	Shoreview Medical	Sean Boyet	Jack Pepper	Angela Lucca

Step 2: Compose Email

Email Recipients

To:

CC:

BCC: (Enter other recipient email addresses.)

Template:

Subject:

Message:

Step 3: Confirmations

Recipient	Case ID	Action Status	Action Error Message
aklcrm@yahoo.com	220329	Submitted	

Email Assigned Agent Manager action page

To assign an email to an agent's managers:

1. Click the case summary text that corresponds to the case for which you want to send an email.
2. Compose the email.
3. Click Send.
4. Review the results in the Confirmations section.

Sending Email to a Contact Center Manager

Access the Email Contact Center Manager action page.

Email Contact Center Manager

Step 1: Click on Summary to Select Case

Case ID	Summary	Priority	Status	Customer	Call Center Manager
1	The Ice Maker is broken.	Medium	Open - New Case	Savannah Lee	Pierre DuBios
2	Dishwasher is not cleaning the dishes properly	Medium	Open - New Case	MMA Property Management Group	Pierre DuBios
	Air Conditioner is			Sparkle Clean	

Step 2: Compose Email

Email Recipients

To: GrandmaK@bt.com

CC:

BCC: (Enter other recipient email addresses.)

Template: RC:Case Summary to Case Contct

Subject: Case Summary for Case ID 2

Message:
 Dear Pierre DuBios:
 I would like to thank you for contacting the contact center pertaining to the problem you have reported on 4-11-2001. Below is a Summary of the problem information. Please contact us by responding to this email or calling if you find any

Step 3: Confirmations

Recipient	Case ID	Action Status	Action Error Message
GrandmaK@bt.com	2	Action is completed	

Email Contact Center Manager action page

To send emails to contact center managers:

1. Click the case summary text that corresponds to the case for which you want to send an email.
2. Compose the email.
3. Click Send.
4. Review the results in the Confirmations section.

Sending an Email to a Customer Contact

Access the Email Customer Contact action page.

Email Customer Contact

Step 1: Click... Filters 3

Case ID	Summary	Priority	Status	Customer	Contact	Assigned Agent
3	Air Conditioner is r	Medium	Open - New Case	Sparkle Clean Lau	Jimmy Boyd	Mason Orellana

Step 2: Compose Email

Email Recipients

To:

CC:

BCC: (Enter other recipient email addresses.)

Template:

Subject:

Step 3: Confirmations

Recipient	Case ID	Action Status	Action Error Message
jboyd@sparkle.com	3	Submitted	

Email Customer Contact action page

To send emails to customer contacts:

1. Click the case summary text that corresponds to the case for which you want to send an email.
2. Compose the email.
3. Click Send.
4. Review the results in the Confirmation section.

Escalating Cases

Access the Escalate Cases action page.

Escalate Cases

Select Cases to Escalate				Filters	ALL	ALL	Filter
<input type="checkbox"/>	Case ID	Summary	Agent	Hours Remaining for Entitled Restore	Priority	Escalation Count	Escalation Date
<input type="checkbox"/>	220062	Router not responding	Unknown		Medium	0	
<input type="checkbox"/>	220061	Router Lights are blinking red	Unknown		Medium	0	
<input type="checkbox"/>	220156	Bill Dispute	Unknown		Medium	0	
<input type="checkbox"/>	220311	Support Agent was rude	Unknown		Medium	0	
<input type="checkbox"/>	220084	same nbr being called -- not anyone that this person ...	Unknown		Medium	0	
<input type="checkbox"/>	220390	What is the difference between DSL and ADSL?	Kathy Bell		Medium	0	
<input type="checkbox"/>	220328	Suspects someone is using Calling Card	Kathy Bell		Medium	0	
<input type="checkbox"/>	220065	Problem with Internet Connection	Kathy Bell		Medium	0	
<input checked="" type="checkbox"/>	220389	Service keeps going down. Happens at least once a ...	Kathy Bell		Medium	0	
<input checked="" type="checkbox"/>	220388	No lights blinking on my DSL modem	Kathy Bell		Medium	0	
<input type="checkbox"/>	220329	Concerned that someone is using Corporate 800 ina...	Edward Allen		Medium	0	
<input type="checkbox"/>	220393	Do you have any services for checking the safety of ...	Terry Reardon		Medium	0	
<input type="checkbox"/>	220392	How can I reduce my energy bill?	Terry Reardon		Medium	0	
<input type="checkbox"/>	220402	Problems with service interruptions	Mary Jordan		High	0	
<input type="checkbox"/>	220355	Question about energy audit	Mary Jordan		High	0	
<input type="checkbox"/>	220318	Gas smell	Justin Larson		High	0	
<input type="checkbox"/>	220401	What is the most effective way to put out grease fires?	Terry Reardon		High	0	
<input type="checkbox"/>	220391	Are there fees involved with scheduling additional m...	Terry Reardon		High	0	
<input type="checkbox"/>	220371	How do I increase the credit card limit of my Visa ac...	None		Medium	0	

Escalate

Review Summary and Status				
Case ID	Summary	Escalation From	Escalation To	Status
220388	No lights blinking on my DSL modem	0	1	Processing
220389	Service keeps going down. Happens at least once a day.	0	1	Processing
220388	No lights blinking on my DSL modem	0	1	Processing

Escalate Cases action page

To escalate cases:

1. Select the cases that you want to escalate.
2. Click Escalate.
3. Review the results in the Review Summary and Status section.

Reassigning Cases

Access the Reassign Cases action page.

Reassign Cases

Step 1: Select Cases to Reassign				Filters	Appliances Western	ALL	Filter
<input type="checkbox"/>	Case ID	Summary	Provider Group	Agent			
<input type="checkbox"/>	273	Refrigerator condensor needs to be cleaned	Appliances Western	David Perry			
<input type="checkbox"/>	135	How to Fix Air Temperature in the freezer	Appliances Western	David Perry			
<input type="checkbox"/>	134	How to clean Waste Disposal.	Appliances Western	David Perry			
<input type="checkbox"/>	122	Freezer is smelling bad	Appliances Western	David Perry			
<input type="checkbox"/>	119	Discoloration in the dishwasher	Appliances Western	David Perry			

Step 2: Select Agent to Reassign To				Filters	ALL	ALL	Filter
<input type="radio"/>	Provider Group		Agent				
<input type="radio"/>	Appliances Western		Susan Davies				
<input type="radio"/>	Appliances Western		John Turner				
<input checked="" type="radio"/>	Appliances Western		Sharon Warner				
<input type="radio"/>	Appliances Western		Ben Harris				

Review Summary and Status				
Case ID	Summary	Assign From	Assign To	Status
1	The Ice Maker is broken.	John Turner	Sharon Warner	Processing

Reassign Cases action page

To reassign cases to provider groups or agents:

1. Select the cases that you want to reassign.
2. Select the provider group or agent to whom you want to reassign the cases.
3. Click Reassign.
4. Review the results in the Review Summary and Status section.

Reassigning Email

Access the Reassign Email action page.

Reassign Email

Step 1: Select Emails to Reassign

Filters: ERMS Worklist - Camera Default | NULL | Filter

<input type="checkbox"/>	Email ID	Email Subject	Group Worklist	Agent
<input type="checkbox"/>	3	test 3	ERMS Worklist - Camera Default	
<input type="checkbox"/>	4	test 4	ERMS Worklist - Camera Default	
<input type="checkbox"/>	5	test 5	ERMS Worklist - Camera Default	
<input type="checkbox"/>	6	test 6	ERMS Worklist - Camera Default	
<input type="checkbox"/>	17	Testing from Kelly	ERMS Worklist - Camera Default	
<input type="checkbox"/>	19	Partner Email test	ERMS Worklist - Camera Default	
<input type="checkbox"/>	20	Test - Remove	None	
<input type="checkbox"/>	21	Test email for partners	None	

Step 2: Select Assignment

Filters: ALL | ALL | Filter

<input type="radio"/>	Group Worklist	Agent
<input type="radio"/>	Account Managers	
<input type="radio"/>	Account Managers	Calvin Harper
<input type="radio"/>	Account Managers	Darlene Bergsten
<input type="radio"/>	Account Managers	Ed Farley
<input type="radio"/>	Account Managers	Jeff Bergeron
<input type="radio"/>	Account Managers	Kelly Kirby
<input type="radio"/>	Animal Control Group Worklist	
<input type="radio"/>	Animal Control Group Worklist	Christina Diaz

Reassign

Review Summary and Status

Email ID	Email Subject	Assign From Group Workli	Assign To Group Worklist	Assign From Agent	Assign To Agent	Status
12	Re: RE: test 3	ERMS Worklist - Computer	Appliances Eastern Group			
6	test 6	ERMS Worklist - Camera C	Account Managers		Calvin Harper	
16	This time a normal file attachment	ERMS Worklist - Computer	ERMS Worklist - Camera D		Alex Ash	

Reassign Email action page

To reassign emails to groups or agents:

1. Select the emails that you want to reassign.
2. Select the group or agent to whom you want to reassign the case.
3. Click Reassign.
4. Review the results in the Review Summary and Status section.

Updating Case Priorities

Access the Update Priority action page.

Update Priority

Step 1: Select Cases to Update Priority						
					Filters	Alan Bailey
						Medium
Filter						
<input type="checkbox"/>	Case ID	Summary	Agent	Status	Priority	Escalation Count
<input checked="" type="checkbox"/>	9	Refrigerator condensor coil not wor...	Alan Bailey	Open - New Case	Medium	0

Step 2: Select New Priority	
Priority	
<input checked="" type="radio"/> High	
<input type="radio"/> White Board Case	
<input type="radio"/>	
Submit	

Review Summary and Status				
Case ID	Summary	Priority From	Priority To	Status
9	Refrigerator condensor coil not working	Medium	High	Processing

Update Priority action page

To update the priority of selected cases:

1. Select the cases for which you want to update the priority.
2. Select the new priority.
3. Click Submit.
4. Review the results in the Review Summary and Status section.

Updating Case Statuses

Access the Update Status action page.

Update Status

Step 1: Select Cases to Update S...
Filters ALL Filters Open Filters ALL, Open - New

<input type="checkbox"/>	Case ID	Summary	Agent	Status Category	Status	Priority
<input type="checkbox"/>	137	Removing Yellow and Brown discolo...	None	Open	Open - New Case	Medium
<input type="checkbox"/>	136	How to get the dishes clean in the ...	None	Open	Open - New Case	Medium
<input type="checkbox"/>	128	Need information about "lens indica...	None	Open	Open - New Case	Medium
<input type="checkbox"/>	126	Dishwasher has yellow grime and t...	None	Open	Open - New Case	Medium
<input type="checkbox"/>	117	Air is not cool enough	None	Open	Open - New Case	Medium
<input type="checkbox"/>	10	Ice maker is not working.	None	Open	Open - New Case	Medium

Step 2: Select New Status
Status Category ALL

<input type="checkbox"/>	Status	Status Category
<input type="checkbox"/>	On Hold	On-Hold
<input checked="" type="checkbox"/>	Open - Awaiting User	Open
<input type="checkbox"/>	Open - Awaiting Eng	Open

Review Summary and Status

Case ID	Summary	Status From	Status To	Status
9	Refrigerator condensor coil ...	Open - New Case	Open - Awaiting User	Processing

Update Status action page

To update the status of selected cases:

1. Select the cases for which you want to update the status.
2. Select the new status.
3. Click Submit.
4. Review the results in the Review Summary and Status section.

Relating Cases to Each Other

Access the Relate Cases action page.

Relate Cases

Step 1: Select Cases to Relate as Children									
Case ID	Case Summary	Customer	Product	Category	Type	Detail	Status	Parent Exists	Filter
<input type="checkbox"/>	1 The Ice Maker is broken.	Savannah Lee	21.6 cu. Ft. Top Refrigerator	None	Technical Question	None	Open - Awaiting User		
<input type="checkbox"/>	2 Dishwasher is not cleaning the dishes properly	MMA Property Manag	24 in. Dishwasher 5 Cycles (St	None	Technical Question	None	Open - New Case		
<input type="checkbox"/>	3 Air Conditioner is not cooling the room Cleaning the Dish	Sparkle Clean Laund	6600 BTU Room Air (Light Beige 24 in. Dishwasher 5	None	Technical Question	None	Open - New Case		

Step 2: Select Parent Case									
Case ID	Case Summary	Customer	Product	Category	Type	Detail	Status	Number of Children	Filter

Step 3: Select Relationship Type	
Relationship Type	
<input type="radio"/>	Common
<input type="radio"/>	Global
<input type="radio"/>	Common
<input type="button" value="Relate"/>	

Review Summary and Status					
Child Case ID	Child Case Summary	Parent Case ID	Parent Case Summary	Status	

Relate Cases action page

To relate one or more child case to a parent case:

1. Select the cases that you want to use as the child cases.
2. Select the case that you want to use as the parent case to which the child cases will be related.
The parent case list only shows cases that are in an open or an on-hold status. Also the *Is Parent Indicator* must be *Yes*. In other words, the system will display only those cases that have been related as parent.
3. Select the relationship type.
4. Click Relate.
5. Review the results in the Review Summary and Status section.

Creating Case Tasks

Access the Create Case Task page.

Create Case Task

Step 1: Select Cases to create a Task

Filters
ALL
ALL
ALL
Filter

<input type="checkbox"/>	Case ID	Summary	Agent	Status	Category	Status	Priority
<input type="checkbox"/>	1	The Ice Maker is broken.	Mason Orellana	Open		Open - New Case	Medium
<input checked="" type="checkbox"/>	2	Dishwasher is not cleaning the dis...	Teresa Pine	Open		Open - New Case	Medium
<input type="checkbox"/>	3	Air Conditioner is not cooling the r...	Mason Orellana	Open		Open - New Case	Medium
<input type="checkbox"/>	5	Cleaning the Dish Washer	David Perry	Open		Open - New Case	Medium

Step 2: Create Task

Task Type

Start Date

Subject

Description

Priority

End Date

Create Task

Review Summary and Status

Case ID	Summary	Task Type	Status
Opening...			

Create Case Task page

To create a case task:

1. Select the cases for which you want to create a task.
2. Enter information about the task in the Create Task section.
3. Click Create Task.
4. Review the results in the Review Summary and Status section.

APPENDIX A

Sales Dashboard Objects

This appendix provides information on source data load objects and data deletion plans for PeopleSoft Sales.

See Also

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, “Setting Up the Dashboard,” Initiating a Batch Data Load

[Chapter 4, “Loading Dashboard Data,” Understanding the Data Load Process, page 15](#)

Source Data Load Objects

The table below lists the object group IDs, description, object type IDs and plans that load tables into the Active Data Cache (ADC) for PeopleSoft Sales. When loading dashboard data for the first time, use the CRM Initial Data Load page to load all your data.

If you want to load single object types or group object types use the Batch Data Load page, If you use the Batch Data Load page, load the common dashboard data before you load specific sales data.

You should also load groups marked initial load data before you load the data with the other group IDs. You can select the appropriate object group IDs on the Batch Data Load page in your PeopleSoft CRM application. After loading the common dashboard data, load the initial load groups and then the other groups that are listed in this table:

Note. PeopleSoft delivers a Detailed Forecast data object but it is not used in any of the reports that are delivered. We provide this data object so customers can use it to create their own reports.

Object Group ID	Description	Object Type ID	Plan
Sales Dimensions	Loads initial data for:	RSFD_CAMPAGN	SLD.MarketingCampaign
	• Campaigns	RSFD_FALLOUT	SLD.FalloutReason
	• Fallouts	RSFD_FCAST_TYPE	SLD.ForecastType
	• Forecast types	RSFD_INDUSTY_VW	SLD.Industry
	• Industries	RSFD_LE_RATE	SLD.LeadRating
	• Lead rating	RSFD_LE_RJCT	SLD.LeadRejectReason
	• Lead reject reason	RSFD_LE_SRCE	SLD.LeadSource
	• Lead source	RSFD_LE_STAT	SLD.LeadStatus
	• Lead status	RSFD_OP_STAT	SLD.OpportunityStatus
	• Opportunity status	RSFD_PRIORTY	SLD.SalesPriority
	• Sales Priority	RSFD_RV_TYPE	SLD.RevenueType
	• Revenue type	RSFD_SEGMENT	SLD.PipelineSegment
	• Pipeline segment	RSFD_SMGR	SLD.SalesManagerAccess
	• Sales manager	RSFD_STAGE	SLD.SalesStage
	• Sales stage	RSFD_USER	SLD.SalesUser
	• Sales user	RSFD_TASK_STATUS	SLD.TaskStatus
	• Task status	RSFD_TERR	SLD.Territory
	• Territory	RSFD_TFP_ANN	SLD.Timeframes Annual
	• Annual timeframes	RSFD_TFP_QTR	SLD.Timeframes Quarterly
	• Quarterly timeframes	RSPD_ACCOUNT	SLD.Account
• Accounts	RSPD_PLAN_TYPE	SLD.AccountPlanType	
• Account plan types	RSPD_STATUS	SLD.AccountPlanStatus	
• Account plan statuses			

Object Group ID	Description	Object Type ID	Plan
Sales Fact Messages 1	Loads data for: <ul style="list-style-type: none"> • Call reports • Forecast details • Leads • Manager forecasts • Manager open revenue • Manager pipeline • Manager quota • Manager revenue • Opportunity header • Opportunity history • Pipeline segment quotas • Manager quotas • Tasks • Account teams • Account plan goals <p>Note. Standalone tasks are not loaded because they do not have timeframes.</p>	RSFD_CALL_RPT RSFD_FC_DTL RSFD_LEAD RSFD_MGR_FCST RSFD_MGR_OPEN_REV RSFD_MGR_PIPELINE RSFD_MGR_QUOTA RSFD_MGR_REV RSFD_MGR_REV RSFD_OPP_HDR RSFD_OPP_HIST RSFD_PLQS RSFD_PLQSM_MGR RSFD_TASK RSPD_ACCT_TEAM RSPD_PLNGOAL	SLD.CallReport SLD.Forecast SLD.Lead SLD.MgrForecastByTF SLD.MgrOpenRevenueByTF SLD.PipelineByMgr SLD.MgrQuotaByTF SLD.MgrActRevenueByTF SLD.OpportunityHDR SLD.Opportunity Updates SLD.PipelineSegmentQuota SLD.PipelineQuotaByMgr SLD.Task SLD.AccountTeam SLD.AccountPlanGoal
Sales Fact Messages 2	Loads initial opportunity data for: <ul style="list-style-type: none"> • Competitor • Opportunity forecasts • Opportunity representatives 	RSFD_OPP_COMP RSFD_OPP_FCST RSFD_OPP_REP	SLD.OpportunityCOMP SLD.OpportunityFCST SLD.OpportunityREP
Sales Fact Messages 3	Loads initial security data for division managers	RSFD_DMGR	None

Note. If the facts do not load properly, you can reload data for a single data object. For example if the Sales Manager Access and Account Manager Access data objects do not load properly, you can use the Batch Data Load page for dashboards and do an initial load for just the RSFD_SMGR object type, as the Mgr Person SID field may not always get updated. You can then run the RSFD_DMGR data object after RSFD_SMGR has been loaded. Since the Sales Manager Access and Account Manager Access data objects drive security, it is important that these data objects load correctly.

Data Deletion Plans

This table lists the reports, alerts, and plans that enable you to remove data from the ADC on a regular basis:

See Chapter 4, “Loading Dashboard Data,” Understanding the Data Load Process, page 15.

Plan	Description	Data Objects	Report	Alert
SLD.Clean up Account Plan Goal	Deletes two years of account plan goals data.	SLD.Account Plan Goals	Overall Attainment of Plan Goals	None
SLD.Clean up Call Report	Deletes one year of call report data.	SLD.Call Report	Average Revenue Per Account	None
SLD.Clean up Forecast Details	Deletes two years of forecast detail data.	SLD.Forecast Detail	Forecast Attainment	None
SLD.Clean up Lead	Deletes one year of lead data.	SLD.Lead Deletes 1 year of Lead data	Lead Conversion Rate Pipeline Health Percentage	None
SLD.Clean up Opportunity Forecast	Deletes all opportunities that were closed within the last two years.	SLD.Opportunity Forecast	Forecast as Percentage of Plan Quota Attainment Percentage	None
SLD.Clean up Opportunity Related	Deletes two years or data if the opportunities have been closed or there is no forecast information.	SLD.Opportunity Header SLD.Opportunity Sales Rep SLD.Opportunity Competitor	Win Ratio Pipeline Health Percentage Revenue Win Rate Average Revenue per Account Watch List Opportunity Rate	None
SLD.Clean up Overdue Task	Deletes any tasks before the current date.	SLD.Overdue Tasks	Watch List Opportunity Rate	None
SLD.Clean up Task	Deletes tasks that are over a year old.	SLD.Task	Watch List Opportunity Rate	Overdue Task
SLD.Clean up Touch	Deletes touch data that is over a year old.	SLD.Touch	Account Touch Rate	None

APPENDIX B

Order Capture Dashboard Objects

This appendix provides information on source data load objects and deletion plans for PeopleSoft Order Capture.

See Also

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, “Setting Up the Dashboard,”
Initiating a Batch Data Load

[Chapter 4, “Loading Dashboard Data,” Understanding the Data Load Process, page 15](#)

Source Data Load Objects

The following table lists the object group IDs, description, object type IDs and plans that load tables into the Active Data Cache (ADC) for PeopleSoft Order Capture. When loading dashboard data for the first time, use the CRM Initial Data Load page to load all your data.

If you want to load single object types or group object types use the Batch Data Load page, If you use the Batch Data Load page, load the common dashboard data before you load specific order capture data.

You should also load dimension data before you load fact data. You can select the appropriate object group IDs on the Batch Data Load page in your PeopleSoft CRM application.

Object Group ID	Description	Object Type ID	Plan
Order Capture Dimensions	Loads dimension data for: <ul style="list-style-type: none"> • Activity definitions • Business project definitions • Carriers • Hold definitions • Header status • Hold status • Line status • Source • Task definitions • Capture types 	OCD_ACTIV_VW OCD_BUSPROJ_VW OCD_CARRIER_VW OCD_DEFHOLD_VW OCD_HDSTAT_VW OCD_HOLDST_WRK OCD_LNSTAT_VW OCD_SOURCE_VW OCD_TASK_VW OCD_TYPE_VW	OCD.Setup Business Project Activity Definition OCD.Setup Business Project Definitions OCD.Setup Carrier Definitions OCD.Setup Hold Code Definitions OCD.Setup Header Status Code Definitions OCD.Setup Hold Status Definitions OCD.Setup Line Status Definitions OCD.Setup Source Code Definitions OCD.Setup Task Definitions OCD.Setup Capture Type Definitions
Order Capture Facts	Loads dimension messages for: <ul style="list-style-type: none"> • Carriers • Product Relations 	OCD_CARRIER_VW OCD_PRODRL_VW	OCD.Setup Carrier Definitions OCD.Product Relations
Order Capture Facts	Loads fact messages for: <ul style="list-style-type: none"> • Business project statuses • Destinations • Headers • Holds • Lines • Task status 	OCD_BPSTAT_VW OCD_DEST_VW OCD_HDR_TMP OCD_HOLD_VW OCD_LINE_TMP OCD_TSKSTAT_VW Note. The OCD_BPSTAT_VW message needs the OCD.BP Process Instance plan running.	OCD.BP Statuses OCD.Order Destination OCD.Order Header OCD.Order Holds OCD.Order Line OCD.Task Status

Note. The OCD.Summary Calculations plan runs at intervals of about 15 minutes. This plan updates work tables used for alerts and the revenue amounts on the Order Header fact table. It also updates the potentially lost revenue report.

Data Deletion Plans

This table lists the plan, description, facts and data sources, and alerts that enable you to remove data from the ADC on a regular basis:

See Chapter 4, “Loading Dashboard Data,” Understanding the Data Load Process, page 15.

Plan	Description	Facts and Data Sources	Alert
OCD.DeletionPlan	Deletes order capture data objects that are older than 6 months.	The deletion plan impacts these facts and data sources: <ul style="list-style-type: none"> • Business Project Instance • Business Project Line Fact • Business Project Order Fact • Hold Line Fact • Hold Order Fact • Order Destination Fact • Order Header Fact • Order Line Fact 	None

APPENDIX C

Contact Center Dashboard Objects

This appendix provides information on source data load objects, source data load plans, data deletion plans, and dashboard tables for PeopleSoft Contact Center Dashboard applications.

See Also

PeopleSoft Enterprise Dashboard Integration Framework for CRM 9 PeopleBook, “Setting Up the Dashboard,” Initiating a Batch Data Load

[Chapter 4, “Loading Dashboard Data,” Understanding the Data Load Process, page 15](#)

Source Data Load Objects

This section lists the object types and plans that load tables into the Active Data Cache (ADC) for PeopleSoft Services. When loading dashboard data for the first time, however, use the CRM Initial Data Load page to load all your data.

If you want to load single object types use the Batch Data Load page. If you use the Batch Data Load page, load common dashboard data before you load specific Contact Center Dashboard data for the call center applications.

On the Batch Data Load page, use *Contact Center Dashboards* as the Application Code. If you select all objects, the system loads all email, interaction, and case data for the Contact Center Dashboards: Support (Services), HelpDesk and HelpDesk for Human Resources

Note. Before running the batch data load, make sure that you define the initial load options.

See [Chapter 4, “Loading Dashboard Data,” Defining Application-Specific Data Load Options, page 23](#).

Object Types

You can use the Batch Data Load page to load these object types into the ADC:

Object Type ID	Description
SDB_AGRMNTLN_VW	Agreement
SDB_CA_TY_DE_VW	Details
SDB_CA_TY_VW	Speciality type
SDB_CASE_VW	Case transactions

Object Type ID	Description
SDB_CASETYPE_VW	Case type
SDB_CATEGORY_VW	Category
SDB_E_CASE_VW	Case email associations
SDB_E_DTL_VW	Email detail status
SDB_E_MOOD_VW	Inbound email mood
SDB_E_PRIORITY_VW	Inbound email priority
SDB_E_PROC_VW	Email process status
SDB_E_SYSDFN_VW	ERMS system definition
SDB_I_STATUS_VW	Email and Interaction status
SDB_I_TYPE_VW	Interaction type
SDB_IB_EMAIL_VW	Inbound email
SDB_IMPACT_VW	Impact
SDB_INTERACT_VW	Interaction
SDB_LANGUAGE_VW	Language code
SDB_MAILBOX_VW	Mailbox definition
SDB_MCF_QUE_VW	MCF queue table
SDB_O_STATUS_VW	Correspondence request status
SDB_OB_EMAIL_VW	Outbound email
SDB_OB_TMPL_VW	Template usage
SDB_PACKAGE_VW	ERMS package definition
SDB_PRIORITY_VW	Priority
SDB_PROBTYPE_VW	Problem type
SDB_REL_CASE_VW	Case relationship type
SDB_RELATION_VW	Case relationship type
SDB_RESP_IND_VW	SLA response indicator
SDB_REST_IND_VW	SLA restore indicator
SDB_SB_I_TYP_VW	Sub interaction type

Object Type ID	Description
SDB_SEVERITY_VW	Severity
SDB_SOURCE_VW	Source
SDB_STATUS_VW	Status
SDB_SUBINTER_VW	Sub interactions
SDB_SUBTYPE_VW	Case subtype
SDB_TMPL_CAT_VW	Template category
SDB_TMPL_DEF_VW	Template definition
SDB_TMPL_TYP_VW	Email template type
SDB_VERTICAL_VW	Case vertical
SDB_WFGRP_AG_VW	Email Group Member
SDB_WFWL_GRP_VW	Email Group worklist

Plans

These plans load data from the CRM database directly into the ADC:

Plan	Description
SDB.SupportCaseDaily	Loads 3 months of data for the Support dashboard.
SDB.SupportCaseWeekly	Loads 6 months of data for the Support dashboard.
SDB.SupportCaseMonthly	Loads 2 years of data for the Support dashboard.
SDB.HelpDeskCaseDaily	Loads 3 months of data for the HelpDesk dashboard.
SDB.HelpDeskCaseWeekly	Loads 6 months of data for the HelpDesk dashboard
SDB.HelpDeskCaseMonthly	Loads 2 years of data for the HelpDesk dashboard.
SDB.HRHelpDeskCaseDaily	Loads 3 months of data for the HR HelpDesk dashboard.
SDB.HRHelpDeskCaseWeekly	Loads 6 months of data for the HR HelpDesk dashboard.
SDB.HRHelpDeskCaseMonthly	Loads 2 years of data for the HR HelpDesk dashboard.
SDB.EmailDaily	Loads 3 months of email data.
SDB.EmailWeekly	Loads 6 months of email data.
SDB.EmailMonthly	Loads 2 years of email data.

Plan	Description
SDB.InteractionDaily	Loads 3 months of interaction data.
SDB.InteractionWeekly	Loads 6 months of interaction data.
SDB.InteractionMonthly	Loads 2 years of interaction data.

Data Deletion Plans

This table lists the plans, descriptions, fact and data sources, alerts and reports that enable you to remove data from the ADC on a regular basis:

See [Chapter 4, “Loading Dashboard Data,” Understanding the Data Load Process, page 15.](#)

Plan	Description	Fact and Data Source	Alert	Report
SDB.DeleteSupport Case	Deletes old fact data for Support except for the last 3 months.	Support Case	SDB.Run.Summary Plan - Old Support Case	System - Old Support Case
SDB.DeleteSupport Case Daily	Deletes old data except for the last 3 months for the Support dashboard.	Support Case Daily	SDB.Run.Summary Plan - Old Support Case Daily	System - Old Support Case Daily
SDB.DeleteSupport CaseWeekly	Deletes old data except for the last 6 months for the Support dashboard.	Support Case Weekly	SDB.Run.Summary Plan - Old Support Case Weekly	System - Old Support Case Weekly
SDB.DeleteSupport CaseMonthly	Deletes old data except for the last 2 years for the Support dashboard.	Support Case Monthly	SDB.Run.Summary Plan - Old Support Case Monthly	System - Old Support Case Monthly
SDB.DeleteHelpDesk Case	Deletes old fact data for HelpDesk except for the last 3 months.	HelpDesk Case	SDB.Run.Summary Plan - Old HelpDesk Case	System - Old HelpDesk Case
SDB.DeleteHelpDesk CaseDaily	Deletes old data except for the last 3 months for the HelpDesk dashboard.	HelpDesk Case Daily	SDB.Run.Summary Plan - Old HelpDesk Case Daily	System - Old HelpDesk Case Daily
SDB.DeleteHelpDesk CaseWeekly	Deletes old data except for the last 6 months for the HelpDesk dashboard.	HelpDesk Case Weekly	SDB.Run.Summary Plan - Old HelpDesk Case Weekly	System - Old HelpDesk Case Weekly

Plan	Description	Fact and Data Source	Alert	Report
SDB.DeleteHelpDesk CaseMonthly	Deletes old data except for the last 2 years for the HelpDesk dashboard.	HelpDesk Case Monthly	SDB.Run.Summary Plan - Old HelpDesk Case Monthly	System - Old HelpDesk Case Monthly
SDB.DeleteHRHelpDesk Case	Deletes old fact data for HR HelpDesk except for the last 3 months.	HRHelpDesk Case	SDB.Run.Summary Plan - Old HRHelpDesk Case Daily	System - Old HRHelpDesk Case Daily
SDB.DeleteHRHelpDesk CaseDaily	Deletes old data except for the last 3 months for the HR HelpDesk dashboard.	HRHelpDesk Case Daily	SDB.Run.Summary Plan - Old HRHelpDesk Case Weekly	System - Old HRHelpDesk Case Weekly
SDB.DeleteHRHelpDesk CaseWeekly	Deletes old data except for the last 6 months for the HR HelpDesk dashboard.	HRHelpDesk Case Weekly	SDB.Run.Summary Plan - Old HRHelpDesk Case Weekly	System - Old HRHelpDesk Case Weekly
SDB.HRHelpDesk CaseMonthly	Deletes old data except for the last 2 years for the HR HelpDesk dashboard.	HRHelpDesk Case Monthly	SDB.Run.Summary Plan - HRHelpDesk Case Monthly	System - Old HRHelpDesk Case Monthly
SDB.DeleteEmail	Deletes old fact data for emails except for the last 3 months.	Email	SDB.Run.Summary Plan - Old Email	System - Old Email
SDB.DeleteEmailDaily	Deletes old email data except for the last 3 months.	Email Daily	SDB.Run.Summary Plan - Old Email Daily	System - Old Email Daily
SDB.DeleteEmailWeekly	Deletes old email data except for the last 6 months.	Email Weekly	SDB.Run.Summary Plan - Old Email Weekly	System - Old Email Weekly
SDB.DeleteEmailMonthly	Deletes old email data except for the last 2 years.	Email Monthly	SDB.Run.Summary Plan - Old Email Monthly	System - Old Email Monthly
SDB.InteractionDelete	Deletes old fact data for interactions except for the last 3 months.	Interaction	SDB.Run.Summary Plan - Interaction Daily	System - Old Interaction
SDB.Interaction DailyDelete	Deletes old interaction data except for the last 3 months.	Interaction Daily	SDB.Run.Summary Plan - Old Interaction Daily	System - Old Interaction Daily

Plan	Description	Fact and Data Source	Alert	Report
SDB.Interaction WeeklyDelete	Deletes old interaction data except for the last 6 months.	Interaction Weekly	SDB.Run.Summary Plan - Old Interaction Weekly	System - Old Interaction Weekly
SDB.Interaction MonthlyDelete	Deletes old interaction data except for the last 2 years.	Interaction Monthly	SDB.Run.Summary Plan - Old Interaction Monthly	System - Old Interaction Monthly

Dashboard Tables

This section lists the transformations that occur for the dashboard and CRM fields for these tables:

- Case Table (SDB_CASE_VW)
- Interaction (SDB_INTERACT_VW)
- Email (SDB_IB_EMAIL_VW and SDB_IB_EMAIL_VW)

Case Table (SDB_CASE_VW)

This table lists the dashboard fields, the related CRM fields (if any) and the transformations that occur before the data is used by the dashboard:

Dashboard Field	CRM Field	Transformation
Case ID	CASE_ID	Include all open and closed cases for the last 3 months.
Business Unit SID	BUSINESS_UNIT RBD_SRC_SYS_ID	Lookup in plan.
Business Unit Code	BUSINESS_UNIT	This is not a look up because it is needed for targets.
Business Unit Call Center Manager Person ID Call Center Manager Center Manager Email Address Call Call Center Status	None	Lookup in data object.
Market Code	MARKET	None

Dashboard Field	CRM Field	Transformation
Agreement SID	AGREEMENT_CODE AGR_RENEWAL_NUM AGREEMENT_LINE AGREEMENT_SETID RBD_SRC_SYS_ID	Lookup in plan. Note. Includes additional surrogate key logic applies in case the agreement unit is not in the agreement.
Service Level Code	None	Lookup in data object.
Assigned Agent SID	None	Lookup in plan.
Agent ID Assigned Agent Supervisor Person ID Supervisor Supervisor Email Address Agent Email Address	None	Lookup in data object.
Customer SID	BO_ID_CUST RBD_SRC_SYS_ID	Lookup in plan. Not used for HelpDesk applications.
Customer Customer Value	None	Lookup in data objects. Not used for HelpDesk applications.
Employee SID	BO_ID_CUST RBD_SRC_SYS_ID	Lookup in plan. Not used for the Support application.
Employee BOID Employee Employee ID Department Location Manager Level Employee Email Address	None	Lookup in data object. Not used for the Support application.
Case Subtype	None	Lookup in data object.

Dashboard Field	CRM Field	Transformation
Case Subtype SID	CASE_TYPE CASE_SUBTYPE CASE_TYPE_SETID RDB_SRC_SYS_ID	Lookup in plan.
Case Type	None	Lookup in data object.
Closed DateTime	CLOSED_DTTM	Expression Calculator IF (StrLength (CLOSED_⇒ DTTM) == 0) THEN (NULL_DATETIME) ELSE (ToDateTime (CLOSED_⇒ DTTM))
Display Template ID	None	Expression Calculator
Display Template License Product Code	None	Lookup in data object. DISP_TMPL_ID (LIC_PROD_CD) RC_SUPPORT (RC) RC_HELPDESK (RH) CRM_FIN (RC) CRM_COM (RC) CRM_GOV (RC) CRM_HHD (RHHR)
Problem Type	None	Lookup in data object.
Product SID	PRODUCT_ID PRODUCT_SETID RDB_SRC_SYS_ID	Lookup in plan.
Product	None	Lookup in data object.
Category SID	RC_CATEGORY CASE_CATEGOR_SETID RDB_SRC_SYS_ID	Lookup in plan.
Category	None	Lookup in data object.

Dashboard Field	CRM Field	Transformation
Detail SID	RC_DETAIL RC_TYPE RC_CATEGORY CASE_CATEGOR_SETID RDB_SRC_SYS_ID	Lookup in plan.
Detail	None	Lookup in data object.
Impact SID	RC_IMPACT CASE_IMPACT_SETID RDB_SRC_SYS_ID	Lookup in plan.
Impact	None	Lookup in data object.
Priority SID	RC_PRIORITY CASE_PRIORITY_SETID RDB_SRC_SYS_ID	Lookup in plan.
Priority Priority Category Priority Set ID	None	Lookup in data object.
Response Status	None	Expression Calculator <pre>IF (StrLength (RC_RESP_⇒ DATE) == 0) THEN (NULL_DATETIME) ELSE⇒ (MakeDT (dtGetMonth (ToDateTime (RC_⇒ ⇒ ⇒ RESP_DATE)), dtGetDay (ToDateTime (RC_⇒ RESP_DATE)), dtGetYear (ToDateTime (RC_⇒ RESP_DATE)), dtGetHour (ToDateTime (RC_⇒ RESP_TIME)), dtGetMinute (ToDateTime ⇒ (RC_RESP_TIME)), dtGetSecond (ToDateTime ⇒ (RC_RESP_TIME)))))</pre>
Response Status Code	RC_RESP_IND	Uses SLA response indicator.
Response Status	None	Lookup in data object.

Dashboard Field	CRM Field	Transformation
Actual Response DateTime	RC_RESPMET_DATE RC_RESPMET_TIME	Expression Calculator IF (StrLength (RC_⇒ RESPMET_DATE) ==0) THEN (NULL_DATETIME) ELSE (MakeDT (dtGetMonth(ToDateTime (RC_⇒ ⇒ ⇒ RESPMET_DATE) , dtGetDay(ToDateTime (RC_⇒ RESPMET_DATE)) , dtGetYear(ToDateTime (RC_⇒ RESPMET_DATE)) , dtGetHour(ToDateTime (RC_⇒ RESPMET_TIME)) , dtGetMinute(ToDateTime ⇒ (RC_RESPMET_TIME)) , dtGetSecond (ToDateTime ⇒ (RC_RESPMET_TIME))))
Restore DateTime	RC_REST_DATE RC_REST_TIME	Expression Calculator IF (StrLength (RC_REST_⇒ DATE) ==0) THEN (NULL_DATETIME) ELSE⇒ (MakeDT(dtGetMonth(ToDateTime (RC_⇒ ⇒ ⇒ REST_DATE)) , dtGetDay(ToDateTime (RC_⇒ REST_DATE)) , dtGetYear(ToDateTime (RC_⇒ REST_DATE)) , dtGetHour(ToDateTime (RC_⇒ REST_TIME)) , dtGetMinute(ToDateTime ⇒ (RC_REST_TIME)) , dtGetSecond (ToDateTime ⇒ (RC_REST_TIME))))
Restore Status Code	RC_REST_IND	SLA restore indicator.
Restore Status	None	Lookup in data object.
Source	None	Lookup in data object.
Case Status SID	RC_STATUS CASE_STATUS_SETID RBD_SRC_SYS_ID	Lookup in plan.

Dashboard Field	CRM Field	Transformation
Status Status Category Status Set ID	None	Lookup in data object.
Case Summary	RC_SUMMARY	In the PeopleCode set the summary to <i>Secured</i> if the case is secured. If the case is secured the system will not bring in the summary.
Specialty Type	None	Lookup in data object.
Vertical Code	RC_VERTICAL	None
Vertical	None	Lookup in data object.
Resolved by First Contact	RES_FIRST_CNTCT	None
Case Create DateTime	ROW_ADDED_DTTM	Expression Calculator IF (StrLength (ROW_ADDED_⇒ DTTM) == 0) THEN (NULL_DATETIME) ELSE (ToDateTime (ROW_⇒ ADDED_DTTM))
Case Last Update DateTime	ROW_LASTMANT_DTTM	Expression Calculator IF (StrLength (ROW_⇒ LASTMANT_DTTM) == 0) THEN (NULL_DATETIME) ELSE (ToDateTime (ROW_⇒ LASTMANT_DTTM))
Secure Case Flag Code	SECURE_CASE_FLAG	None
Target Close DateTime	TARGET_CLOSE_DATE	Expression Calculator IF (StrLength (TARGET_⇒ CLOSE_DATE) == 0) THEN (NULL_DATETIME) ELSE (ToDateTime (TARGET_⇒ CLOSE_DATE)) It can be used as an alternative to the SLA due date.
Escalation Count	ESCALATION_COUNT	None

Dashboard Field	CRM Field	Transformation
Escalation DateTime	ESCALATION_DTTM	Expression Calculator <pre> IF (StrLength (ESCALATION_⇒ ⇒ ⇒ DTTM) ==0) THEN (NULL_DATETIME) ELSE (ToDateTime (ESCALATI⇒ ⇒ ON_DTTM)) </pre>
Survey Score	CUST_SAT_CORE	None
Is Parent Indicator	PARENT_FLAG	preProcessRecord <pre> SQLExec ("select COUNT (*)⇒ from PS_SDB_REL_CASE_VW WHERE⇒ CASE_ID = (:1) AND HIERARCHICAL_IND = 'Y' ",⇒ &nCaseID, &nParent); &l_rCase.CHILD_COUNT.Value⇒ ⇒ ⇒ = &nParent; If &nParent > 0 Then &l_rCase.PARENT_FLAG.Value⇒ ⇒ ⇒ = "Y"; End-If; </pre>
Is Child Indicator	CHILD_FLAG	preProcessRecord <pre> SQLExec ("select COUNT (*)⇒ from PS_SDB_REL_CASE_VW WHERE⇒ RELATED_CASE_ID = (:1) AND HIERARCHICAL_IND =⇒ 'Y' ", &nCaseID, &nChild); If &nChild > 0 Then &l_rCase.CHILD_FLAG.Value⇒ = "Y"; End-If; </pre>

Dashboard Field	CRM Field	Transformation
Number of Children	CHILD_COUNT	<pre>preProcessRecord SQLExec ("select COUNT(*) => from PS_SDB_REL_CASE_VW WHERE=> CASE_ID = (:1) AND HIERARCHICAL_IND => 'Y' ", &nCaseID, &n=> Parent); &l_rCase.CHILD_COUNT.Value=> => => = &nParent;</pre>
Number of times case was placed on hold	HOLD_COUNT	<pre>preProcessRecord Loop through RC_STATUS_LOG and count times on hold. Includes current hold.</pre>
Total Minutes on Hold	HOLD_MINUTES	<pre>preProcessRecord Loop through RC_STATUS_LOG and count times on hold. Does not include current hold.</pre>
Placed On Hold DateTime	HOLD_DTTM	<pre>preProcessRecord This transformation is part of the evaluate for the current status category. IF (StrLength (HOLD_DTTM) => => => =0) THEN (NULL_DATETIME) ELSE (ToDateTime (HOLD_=> DTTM))</pre>
Canceled DateTime	CANCEL_DTTM	<pre>preProcessRecord This transformation is part of evaluate for current status category. IF (StrLength (CANCEL_=> DTTM) ==0) THEN (NULL_DATETIME) ELSE (ToDateTime (CANCEL_=> DTTM))</pre>

Dashboard Field	CRM Field	Transformation
Reopened DateTime	REOPEN_DTTM	<p>preProcessRecord</p> <p>This transformation is part of the evaluate for current status category</p> <pre> When = "0" REM Case is Open, check⇒ if it was ever closed or canceled -⇒ Reopened; For &iLog = 2 To &rs⇒ StatusLog.RowCount &rLog = &rsStatusLog.Get⇒ Row(&iLog); If &rLog.RC_STATUS_LOG.STATUS⇒ ⇒ ⇒ _CATEGORY.Value = "C" Or &rLog.RC_STATUS_LOG.STATUS⇒ ⇒ ⇒ _CATEGORY.Value = "D" Then &l_rCase.REOPEN_⇒ DTTM.Value = &rLog.RC_STATUS_LOG.STATU⇒ ⇒ ⇒ S_CHANGE_DTTM.Value; Break; End-If; End-For; Break; Transformation Type:⇒ Expression Calculator IF (StrLength (REOPEN_⇒ DTTM) ==0) THEN (NULL_DATETIME) ELSE (ToDateTime (REOPEN_⇒ ⇒ ⇒ DTTM)) </pre>
Open Case	None	<p>Expression Calculator</p> <pre> IF (Status Category Code ⇒ ⇒ ⇒ = "0") THEN (1) ELSE (0) </pre>

Dashboard Field	CRM Field	Transformation
Closed Case	None	Expression Calculator <pre>IF (Status Category Code => => => ="C") THEN (1) ELSE (0)</pre>
On Hold Case	None	Expression Calculator <pre>IF (Status Category Code ="H") THEN (1) ELSE (0)</pre>
Canceled Case	None	Expression Calculator <pre>IF (Status Category Code => => => ="D") THEN (1) ELSE (0)</pre>
Time to Close	None	Expression Calculator <pre>IF ((IsNull (Closed=> DateTime)==1)) THEN (dtDiffDays (Case=> Create DateTime, Closed=> DateTime)) ELSE (NULL_DOUBLE)</pre>
Time Since Last Case Update	None	Data Object Calculation <pre>now() - {_Case_Last_Update_=> DateTime}</pre> <p>Note. This field will not be updated over time unless the data is accessed. When a report is first opened, this field is calculated. As time progresses, it is not recalculated unless the report is refreshed.</p>
Contact SID	None	Lookup in plan.
Contact Contact Email Address Contact BOID	None	Lookup in data object.

Dashboard Field	CRM Field	Transformation
Throughput		<p>Data Object Calculation</p> <pre>if({_Time_to_Close}<{_Minimum_Time_to_Close_Days_}) then("High") else(if({_Time_to_Close}<{_Minimum_Time_to_Close_Days_1}) then("Medium") else("Low"))</pre>
Red DateTime		<p>Expression Calculator</p> <pre>IF (StrLength (RC_RED_DTMM) ==0) THEN (NULL_DATETIME) ELSE (ToDateTime (RC_RED_DTMM))</pre>
Yellow DateTime	None	<p>Expression Calculator</p> <pre>IF (StrLength (RC_YELLOW_DTMM) ==0) THEN (NULL_DATETIME) ELSE (ToDateTime (RC_YELLOW_DTMM))</pre>
SLA Status	None	<p>Data Object Calculation</p> <pre>if(now()>{_Red_DateTime}) then("Red") else(if(now()>{_Yellow_DateTime}) then("Yellow") else("Green"))</pre> <p>Note. This field will not be updated over time unless the data is accessed. When a report is first opened, this field is calculated. As time progresses, it is not recalculated unless the report is refreshed.</p>

Dashboard Field	CRM Field	Transformation
Red	RED_DTTM	<p>Data Object Calculation</p> <pre>If ({_SLA_Status} == "Red"⇒ ⇒ ⇒)</pre> <p>then (1) else (0)</p> <p>Note. This field will not be updated over time unless the data is accessed. When a report is first opened, this field is calculated. As time progresses, it is not recalculated unless the report is refreshed.</p>
Yellow	YELLOW_DTTM	<p>Data Object Calculation</p> <pre>If ({_SLA_Status} == "Yell⇒ ⇒ ⇒ ow")</pre> <p>then (1) else (0)</p> <p>Note. This field will not be updated over time unless the data is accessed. When a report is first opened, this field is calculated. As time progresses, it is not recalculated unless the report is refreshed.</p>
Green	None	<p>Data Object Calculation</p> <pre>If ({_SLA_Status} == "Gree⇒ ⇒ ⇒ n")</pre> <p>then (1) else (0)</p> <p>Note. This field will not be updated over time unless the data is accessed. When a report is first opened, this field is calculated. As time progresses, it is not recalculated unless the report is refreshed.</p>
Survey Rating	None	Based on targets, system determines if customers are: Dissatisfied, Somewhat Dissatisfied, Satisfied, or Very Satisfied.

Dashboard Field	CRM Field	Transformation
%Red Cases %Yellow Cases Escalations Average Time Close (Days) First Call Resolution Rate Customer Satisfaction Red Case Threshold Minimum Time to Close (Days) for High Throughput Backlog threshold Total Case Backlog Minimum Customer Satisfaction Score for Very Satisfied Minimum Customer Satisfaction Score for Satisfied Minimum Customer Satisfaction Score for Neutral	None	Look up. Values are compared to set targets.
RTS Added DateTime	None	Expression Calculator Only when the insert happens, not for update.dtCurrentDT () When this was added to the dashboard
RTS Updated DateTime	None	When this was updated on the dashboard
Source System ID	None	Set in message.

RTS = Real Time System; SID = Surrogate ID

Interaction (SDB_INTERACT_VW)

This table lists the dashboard fields, the related CRM fields (if any) and the transformations that occur before the data is used by the dashboard:

Dashboard Field	CRM Field	Transformation
Interaction ID	INTERACTION_ID	None
Interaction Sequence Number	SEQNUM	None
Sub Interaction ID	None	None
Customer SID	None	Surrogate key

Dashboard Field	CRM Field	Transformation
Business Unit SID	None	Surrogate key
Business Unit	None	Lookup
Customer Name	None	Lookup
Employee SID	None	Surrogate key
Employee	None	Lookup
Call Volume per Hour	None	Lookup
Customer Value	None	Lookup
Manager Level	None	Lookup
Interaction Detail Type ID	RB_MCF_DETAIL_TYPE	Translate values: Chat, Printer, Outbound Email, Inbound Email, Phone, and Self-Service.
Interaction Type	None	Lookup from translate table.
Parent Interaction ID	PARENT_INTER_ID	None
Root Interaction ID	ROOT_INTER_ID	None
Interaction Status Code	INTERACT_STATUS	None
Interaction Status	None	Lookup
Interaction Begin Date Time	INTERACT_BEGIN	None
Interaction End Date Time	INTERACT_END	None
SubInteraction Object Type Code	SUBINT_OBJ_TYPE	Types: case, order, lead, and so on.
SubInteraction Object Type	None	Lookup from translate table.
SubInteraction begin Date Time	INTERACT_BEGIN	Create new field in CRM.
SubInteraction End Date Time	INTERACT_END	Create new field in CRM.
Interaction Created DateTime	ROW_ADDED_DTTM	None

Dashboard Field	CRM Field	Transformation
Hours	None	<pre> if ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 1.0) then (1) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 2.0) then (2) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 3.0) then (3) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 4.0) then (4) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 5.0) then (5) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 6.0) then (6) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 7.0) then (7) else (if => ((now() - {_Interaction_Created_} DateTime)) => /3600.0) < 8.0) then (8) else (-> 1))))))))) </pre>
Interaction Duration	None	<pre> if ({_INTERACT_END} ==> Null) then ((now() - {_INTERACT_} BEGIN)) /> 60.0) else ((({_INTERACT_END} -> { INTERACT_BEGIN}) / 60.0)) </pre>
Chat	None	<pre> if ({_RB_MCF_DETAIL_TYPE} => == "CHAT") => then (1) else (0) </pre>

Dashboard Field	CRM Field	Transformation
Printer	None	if ({_RB_MCF_DETAIL_TYPE}=> == "CM")=> then (1) else (0)
Outbound Email	None	if ({_RB_MCF_DETAIL_TYPE}=> == "CMEM")=> then (1) else (0)
Inbound Email	None	if ({_RB_MCF_DETAIL_TYPE}=> == "IBEM")=> then (1) else (0)
Phone	None	if ({_RB_MCF_DETAIL_TYPE}=> == "NONE")=> then (1) else (0)
Self Service	None	if ({_RB_MCF_DETAIL_TYPE}=> == "SS")=> then (1) else (0)
Synchronized Email	None	if ({_RB_MCF_DETAIL_TYPE}=> == "SYNC")=> then (1) else (0)
Case ID	CASE_ID	None
Capture ID	CAPTURE_ID	None
Opportunity ID	OPPORTUNITY_ID	None
Lead ID	LEAD_ID	None
Case	None	if ({_SUBINT_OBJ_TYPE} ==> "CASE")=> then (1) else (0)
Lead	None	if ({_SUBINT_OBJ_TYPE} ==> "LEAD")=> then (1) else (0)
Opportunity	None	if ({_SUBINT_OBJ_TYPE} ==> "OPPY")=> then (1) else (0)
Quote	None	if ({_SUBINT_OBJ_TYPE} ==> "QUOT")=> then (1) else (0)
Order	None	if ({_SUBINT_OBJ_TYPE} ==> "ORDE")=> then (1) else (0)
RTS Added DateTime	None	Uses the Expression Calculator to stamp the date and time of creation and update.

Dashboard Field	CRM Field	Transformation
RTS Updated DateTime	None	Uses the Expression Calculator to stamp the date and time of creation and update.
Source System ID	None	None

RTS = Real Time System, SID = Surrogate ID

Email (SBD_IB_EMAIL_VW and SBD_OB_EMAIL_VW)

This table lists the dashboard fields, the related CRM fields (if any) and the transformations that occur before the data is used by the dashboard:

Dashboard Field	CRM Field	Transformation
Source System ID	None	Set in message.
Business Unit SID	BUSINESS_UNIT RBD_SRC_SYS_ID	Lookup
Business Unit	BUSINESS_UNIT	Lookup
Inbound Email ID	MCF_EMAIL_ID	None
Outbound Email ID	CMF_ID	None
Inbound Outbound Indicator	IB_OB_INDICATOR	None
Interaction ID	INTERACTION_ID	None
Interaction Sequence Number	SEQNUM	None
Email Thread ID	None	Lookup
Customer SID	BO_ID_CUST RBD_SRC_SYS_ID	Lookup
Customer	None	Lookup
Product SID	None	Lookup
Product	None	Lookup
Product Group SID	None	Surrogate Key
Product Group	None	Lookup
Last Group Work list SID	LAST_GROUP_WL RBD_SRC_SYS_ID	Lookup
Last Group Work list	None	Lookup

Dashboard Field	CRM Field	Transformation
Assigned Agent SID	ASSIGNED_TO RBD_SRC_SYS_ID	Lookup
Assigned Agent	None	Lookup
Assigned Date Time	ASSIGNED_DTTM	None
Closed Date Time	CLOSED_DTTM	None
Current Work list SID	CURRENT_WL RBD_SRC_SYS_ID	Lookup
Current Work list	None	Lookup
Email Due Date Time	MB_DUE_DTTM	None
Email Mood SID	MOOD_ID RBD_SRC_SYS_ID	Lookup
Email Mood	None	Lookup
Email Priority SID	PRIORITY_NBR RBD_SRC_SYS_ID	Lookup
Email Priority	None	Lookup
Interaction Type	RB_MCF_DETAIL_TYPE	For inbound email the default is IBEM. For outbound email the default is CMEM.
Email Status SID	EMAIL_STATUS	Lookup
Email Status	None	Lookup
Email Detail Status Code	RB_DETAIL_STATUS	Translate value
Email Detail Status	None	Lookup

Dashboard Field	CRM Field	Transformation
Email Response Status	None	<p>Derived Email Status.</p> <p>Spam is not part of Email Status. To include Spam in the status, this derived field is used. The system uses these statuses: Auto, Agent, or Spam.</p> <ul style="list-style-type: none"> Inbound Email: <pre> Calculated1 = IF (EMAIL_⇒ SPAM_⇒ INDICATOR = Y) THEN ⇒ (Spam) ELSE (IF⇒ (RB_DETAIL_STATUS = AUT⇒ THEN (Auto⇒ Response) ELSE (Agent⇒ Response)) </pre> Outbound Email <p>Not applicable</p>
Auto Response Indicator	None	<ul style="list-style-type: none"> Inbound Email: <p>This field is set using the Expression Calculator. If the Email Detailed Status = "AUT" this field is set to Y else this field is set to N.</p> Outbound Email: <p>Not Applicable</p> <p>Note. This logic is applicable for both static and dynamic loading.</p>
Duplicator Indicator	None	<ul style="list-style-type: none"> Inbound Email: <p>This field is set using the Expression Calculator. If the Email Detailed Status = "DUP" this field is set to Y else this field is set to N.</p> Outbound Email: <p>Not Applicable</p> <p>Note. This logic is applicable for both static and dynamic loading</p>

Dashboard Field	CRM Field	Transformation
Closed By First Contact	None	<ul style="list-style-type: none"> Inbound Email: When the system receives an inbound email, the system sets this field to Y. Outbound Email: When you receive an outbound email, find the corresponding inbound email and then set this Flag to N.
Language Code	LANGUAGE_CD	None
Language	None	Lookup
Email Queue ID	None	Lookup
Email Queue	None	Lookup
Email Process State Code	PROCESS_STATE	None
Email Process State	None	Lookup
Email Reassigned Indicator	EMAIL_REASSIGN_IND	<p>This field is calculated as part of data extraction in PeopleCode.</p> <p>Logic:</p> <pre>IF RB_EM_ROUT_HIST.NEW_WL=> is NOT=> NULL Then Value is Y, else=> value is N</pre>
Email Transferred Indicator	EMAIL_TRANSFER_IND	<p>This field is calculated as part of data extraction in PeopleCode.</p> <p>Logic:</p> <pre>If RB_EM_ROUT_HIST.EMAIL_> STATUS => INPR AND LAST_GROUP_WL IS NULL=> AND NEW_WL=> IS NULL Then Values is=> Y, ELSE=> value is N</pre>
Email Received Date Time	SLA_EXT_BASE_DTTM	None
Email Response Date Time	CLOSED_DTTM	None
Email System Definition ID	SYSTEM_ID	Defaults to CRM.
Spam Template Category ID	TMPLT_CATEGRY_ID	Lookup

Dashboard Field	CRM Field	Transformation
Spam Indicator	None	Expression Calculator: IF SPAM_TMPLT_CAT_ID => TEMPLT_> CATEGORY_ID THEN EMAIL_> SPAM_IND = Y=> ELSE EMAIL_SPAM_IND = N Outbound Email = Not Applicable
Template Category SID	TMPLT_CATEGORY_ID	Lookup
Template Category	None	Lookup
Template Type SID	None	Lookup
Template Type	None	Lookup
Mail Box SID	MAILBOX_ID	Lookup
Mail Box	None	Lookup
New Email Thread Indicator	None	Expression Calculator IF EMAIL_THREAD_ID => INTERACTION_ID=> THEN (Y) ELSE (N) Note. The Email Thread ID is equal to the ROOT_INTER_ID. If the Interaction ID equals the Root Interaction ID the system sets this flag to Y; otherwise, it sets it to N.
Email Warning Date Time	MB_WARN_DTTM	None
RTS Added DateTime	None	Expression Calculator If Action is INSERT Then=> RTS Added DateTime = dtCuttentDT=> ();End-If;
RTS Updated DateTime	None	Expression Calculator If Action is UPDATE Then=> RTS Updated DateTime = dtCuttentDT=> ();End-If;

RTS = Real Time System, SID = Surrogate ID

Glossary of PeopleSoft Enterprise Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee’s job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects-usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met.

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> .
business task	The name of the specific function depicted in one of the business processes.
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.

compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost-plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.
delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.

division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> .
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values-dynamic details-directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.

exclusive pricing	In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to

	run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects.
incentive rule	In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.

joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single

	transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.
PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
plan	In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context-if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.
price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log	In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.
run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.

seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	<p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p>
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity-characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.

source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
speed key	See <i>communication key</i> .
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.

system function	In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	<p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p>
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects.

trace usage	In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> .
user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.
yield by operation	In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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